

SysAid™

User Manual

Notice

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Due to the inherently complex nature of computer software, SysAid does not warrant that

SysAid software is: bug-free, will operate without interruption, is compatible with all equipment and software configurations, or will otherwise meet your needs.

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Support

SysAid is committed to providing world-class technical support and professional services to its customers. **Free support** is included in every product purchase, the freeware edition, or the 30 day trial; this support is provided either by SysAid online, telephone, Skype, e-mail or MSN web messenger.

Before Contacting Support

We recommend that you do the following before contacting Support:

Download and install the product. Review the information on the SysAid Support pages (go to www.ilient.com and click on **Support** and then **Guides** or **FAQs** or search the **Troubleshooting Section**).

Within SysAid interface, you may consult the Help file by clicking the question mark icon  at the left of the top bar. This will open a popup screen with specific explanations about the page you are currently in. To navigate the help files, you may click the help library tree that appears on the left of the popup screen.

1 SysAid Help Files



Support Contact Information - helpdesk@sysaid.com

When contacting Support, please include the following information, or have it available when calling:

- Your service request number.
- Your name, email address and phone number.
- Specific details about the problem, including system message, error codes and logs.
- Details about your system, including the operating system, hardware configuration, network details and other applications running on the system.

Chapter 1 SysAid Modules

SysAid core product includes the following modules:

Helpdesk

Asset management

Monitoring

Reporting

Chat

IT Benchmark

With SysAid you will be able to:

- Automate handling of service calls to reduce response time and improve service
- Lower down-time by using more efficient system management.
- Create various escalation rules to secure your service quality at all times.
- Improve efficiency of hardware and software Asset Management
- Use integrated remote control capability to solve your users' IT issues quickly and securely
- Measure IT performance with detailed reports.
- And much more

SysAid™ contains additional modules that are available for purchase:

- ➡ **Tasks/Projects**
- ➡ **Manager Dashboard**
- ➡ **Monitoring (Server Monitoring and advanced monitoring capabilities)**
- ➡ **ITIL Package (Problem Management, Change Management and CMDB)**

You can also try for free a light edition of **Help Desk** and **Asset Management** or a full 30-day edition both options are available from our web site www.ilient.com

The extra modules are only available with the full 30-day free trial, or upon purchasing the full edition of SysAid.

A Brief Review of the Modules in SysAid

Below is a brief review of each module, and you can find a detailed description of these modules later in this guide.

SysAid Help Desk Management

- Automate handling of **service calls** to reduce **response time** and improve service
- Based on parameters such as category and location, **service requests can be configured** to be rerouted automatically, change their priority or due date and perform other actions
- Service requests can be **sorted** according to user, due date and other fields
- Different views can be added to reflect customized outlooks on the Help Desk requests
- Administrators can create **escalation rules**
- Service requests can be placed in a **knowledgebase**, which can be searched easily
- End users and administrators are **automatically notified** about new, modified and escalated service requests

SysAid help desk offers you either a hosted online solution, or an installed solution for your IT needs. The help desk provides you with a simple yet comprehensive form that enables quick submission of service requests to an IT department. The administrator interface hosts a wide range of functionalities that assist you in managing a busy help desk:

Features included:

- Comprehensive escalation functionalities
- Intuitive, customizable interface and efficient methodology
- Service request priority defined by pre-determined rules based on category, urgency, and other fields

- Automatic routing of service requests according to pre-defined parameters and priority
- Automatic logging of all service requests and corrective actions
- Customizable help desk interface allows sorting of service requests by type, preferences, severity, and more
- Knowledgebase of important service requests
- Editable record of common problems & solutions for end users to browse through
- Full communication abilities--users can email, SMS, and instant-message one another
- Automatic notifications, via email or SMS, of new, modified, and escalated service requests
- Customizable alert system highlights urgent, unresolved, or escalated requests
- User and administrator groups enable dividing the help desk into logical units
- Supports access via mobile phones and PDAs.
- Multilingual capabilities.

SysAid Asset Management

- Lower down-time by using more efficient **system management**
- Improve efficiency of hardware and software **inventory management**
- Desktops, laptops, and other assets are listed and grouped using an **automatic deployment tool**
- Hardware and software changes are **updated automatically**
- Administrators can have complete **remote control** of machines
- Easy integration with external purchasing and ordering systems via **XML**
- All reported changes are saved in a permanent computer record, which contains hardware/software and **service history**

SysAid offers asset management functions. SysAid scans the network of the organization, and provides IT the necessary information. IT managers and administrators can easily see information such as listed above without leaving their offices. SysAid retrieves the assets information automatically, which is by far more effective than listing the data in a spreadsheet. SysAid Asset Management is extremely useful, because it is impossible for IT to manually list all assets, the details of assets, and changes the assets go through.

With SysAid:

- Network computers detected automatically; no need to input assets manually
- Hardware and software of assets are automatically detected and displayed; no need to input asset information manually
- Hardware and software changes on assets detected and updated automatically; SysAid keeps an updated picture of the network and its machines
- All reported changes saved in a permanent "asset record", which contains hardware/software and service history
- Assets easily located using powerful search/listing functionalities
- Full and easy remote control of assets
- Assets interface with the help desk, displaying (and alerting administrators of) service requests associated with them
- Easy integration to external purchasing and ordering systems via XML
- Tracking of software and supplier catalogues
- Enabled feedback about your Helpdesk services from end users.

Monitoring

- **Constant tests** for memory usage, hard disk usage, vital OS services and processes, network services, software and hardware updates and more
- A warning or error notification will be sent to you when something is wrong. SysAid can **open an automatic service request**, notify you by **email**, or even send you an **SMS message**
- You can see a **visual representation** of all the monitoring tests on daily, weekly, monthly and yearly **graphs**
- Configure **monitoring templates** for any number of servers or workstations

With the SysAid monitoring tool:

- Ensure utmost functionality of all your network components, from your most vital network applications, your servers, and down to each individual workstation on your network.
- Servers monitoring and workstations monitoring.
- Configure the necessary checks that will be preformed on each asset or on a group of assets yourself.
- Create special templates composed of different series of checks that can then be assigned to the relevant assets.

Please note: the monitoring module exists in a limited version in the Free SysAid Edition. To learn more about the SysAid Monitoring module, check the complete SysAid Monitoring Guide at:

<http://ilient.com/down/monitoring.pdf>

Reports

- Automatic, pre-defined reports on help desk activity, service quality, hardware/software inventory and more
- Reports can be **configured** to match administrators' needs

Manager Dashboard

- An immediate and customizable graphic Dashboard overview of the state of affairs in your organization
- A wide choice of reports that can be scheduled, customized and sent to different users
- Various possibilities for modifying reports according to your specific needs or creating entirely new reports

Projects and Tasks

- Allows you to create, list and manage projects and tasks
- Tracks work progress and resource use
- Allocates time wisely
- Keeps record of all activities
- Stores relevant documentation
- Graphical Gantt chart of the projects and tasks

ITIL Package

The Information Technology Infrastructure Library (ITIL), is an international framework of best practices for IT management and service quality, released by the UK Office of Government Commerce (formerly CCTA).

SysAid was established in 2003 on core ITIL principles which have since provided the foundation for all future SysAid Research and Development designs. Over the years, we have continued to develop in accordance with ITIL methodology, and remain dedicated to bringing ITIL best practices to your IT environment.

SysAid CMDB

- SysAid CMDB allows you to Keep track of significant elements in your IT network
- Holds an unlimited number of CIs of all types
- Allows more than 250 customizable fields - to fit your exact needs.
- Helps you predict the influence of changes in your network on future developments and business impacts.

ITIL Problem Management

- Analyzing root incident causes
- Proactively handling problem areas to minimize incident recurrence and business impact
- Grouping isolated SRs into related problem themes
- Knowledgebase of known errors and work-around methods.
- Helps you proactively eradicate root problem causes in your organization.

ITIL Change Management

- Handle process framework for implementing effective organizational change
- Minimize the risk of business exposure and service disruption.
- An unlimited number of change processes
- Customizing options to suit any change scenario in your organization.
- Automate workflow approval processes with ITIL's proven chain of approval.
- Apply pre-defined change templates
- Perform multi-level risk assessments and authorizations with a full audit trail.
- Set secure notes, tasks and permissions for multiple stakeholders

And more.

Chapter 2 Installation and Successful Login

If you have purchased SysAid Hosted Online Solution, please go to **SysAid on-demand online Solution** (below) for login details. If you have purchased the installed solution for your server, installation instructions will now follow.

Installation

Please go to the following document for detailed installation instructions:

Guide 1: Installing the SysAid Server

http://www.ilient.com/down/installation_guide.PDF

For detailed instructions on setting up language consult Chapter 7: **Tools for Customization in SysAid.**

Logging In

There are two options to login to SysAid. Either you will access SysAid On-Demand Online Solution from the Internet or you will install SysAid on your network.

SysAid On-Demand Online Solution

Upon ordering the on-demand online solution of SysAid, you were supplied with an Account ID, Username, Password, and login URL. Use your details to login to your SysAid On-Demand Edition. You can also be provided with a unique domain upon request. The account compartmentalizes your network as to distinguish it from other networks that use SysAid online solution. No account has access to any other account, and one account is enough for even the largest organization.

If you have any questions you can contact the support team:

support@sysaid.com

Accessing SysAid on the Network

With the installed edition, open any internet browser. Input a URL in the following form:

Http://<server IP>:port

<Server IP> refers to the IP address of the server SysAid is installed on. Port is the port number SysAid is listening on. If the port is 8080, you do not need to enter it, since browsers assume port 8080 by default. You specified the port number when installing SysAid. If you are using the computer SysAid is installed on, you already have a shortcut under your **Start** menu. You can now start SysAid using this shortcut.

When SysAid loads, input your Username and Password and make a note of it

Enter your Username and Password. Upon installing SysAid on your network, you, the main administrator, were prompted to create an administrator username and password during the installation setup. Please make a note of your Username and Password.

If you forget your main administrator username and password you can reset this password. Note that if your database type is Derby, you would have to go to "services.msc" and stop the "Sys Aid Server" service before running this command.

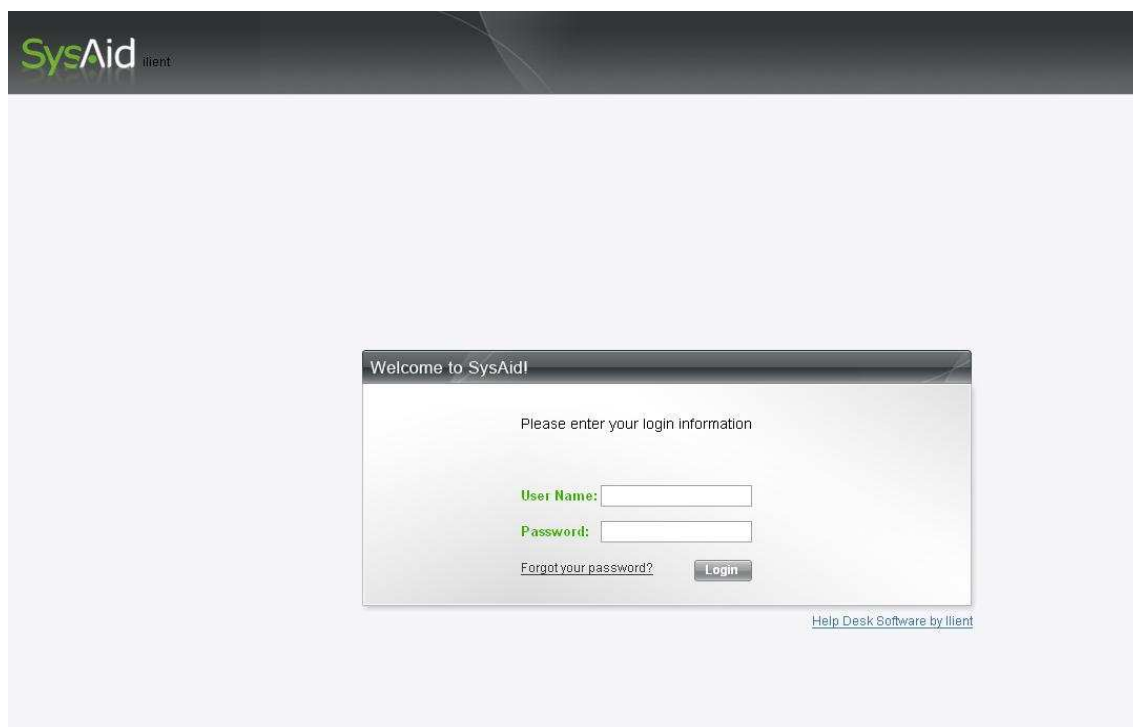
1. Open CMD
2. Change the directory to "C:\Program Files\SysAidServer\util"
(cd C:\Program Files\SysAidServer\util)
3. Type "ResetPassword" and click **Enter**.
4. You will receive a list with the available account Ids

5. Type "ResetPassword account_id" . Please make sure you type the account id from the list above correctly, since it is case sensitive. If you will not type it correctly it may cause a corruption in your database.

Now click the **Submit** button to login.

All users should see the following login screen.

2 Log-in via SysAid on your network



If an ordinary administrator has forgotten his/her password, they can click the link **Forgot your password?** In the login page, and reach the following screen:

3 Forgot Password Screen



SysAid Help Desk

Forgot your password?

Please fill out the fields below.
A new password will be sent to your email.

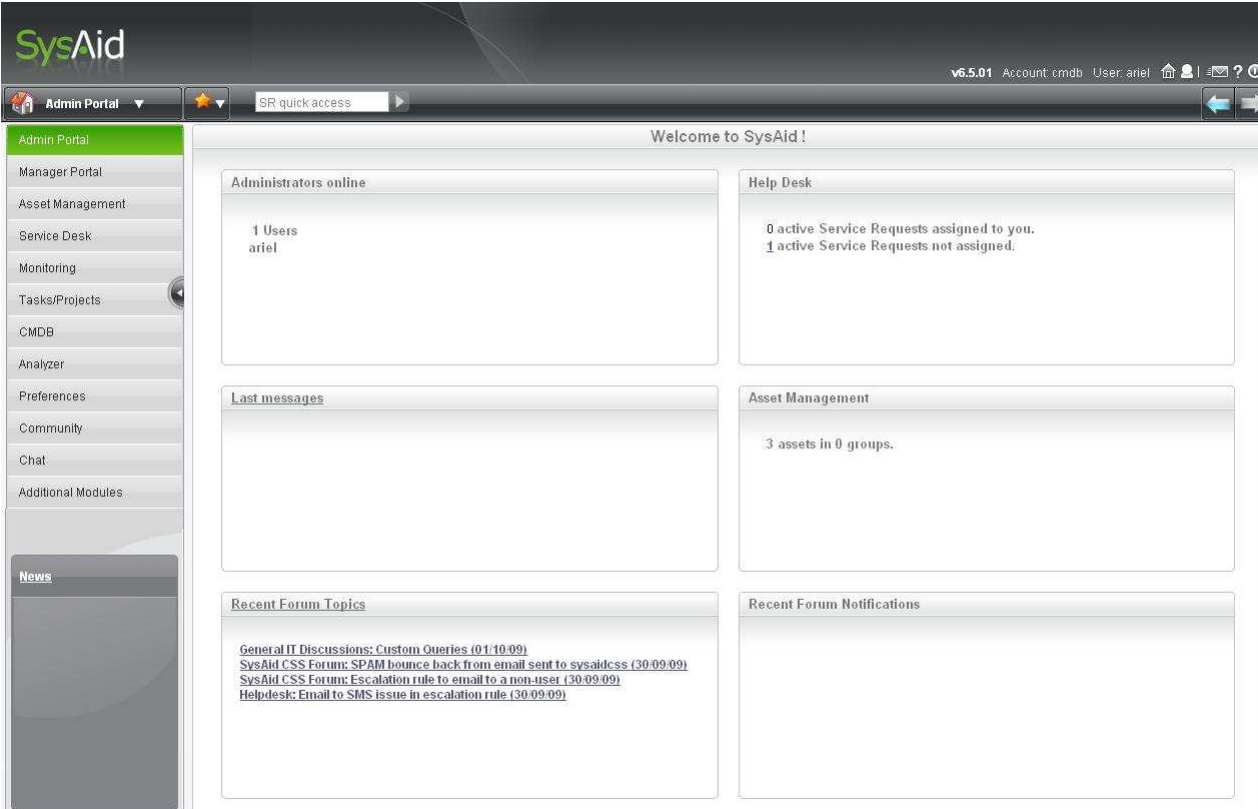
Account:

User Name:

Email:

Once logged-in, administrators will navigate to the administrator interface.

4 SysAid Welcome Home Page



SysAid v6.5.01 Account: cmdb User: ariel

Admin Portal SR quick access

Welcome to SysAid !

Admin Portal

- Manager Portal
- Asset Management
- Service Desk
- Monitoring
- Tasks/Projects
- CMDB
- Analyzer
- Preferences
- Community
- Chat
- Additional Modules

News

Administrators online

1 Users
ariel

Help Desk

0 active Service Requests assigned to you.
1 active Service Requests not assigned.

Last messages

Asset Management

3 assets in 0 groups.

Recent Forum Topics

General IT Discussions: Custom Queries (01/10/09)
SysAid CSS Forum: SPAM bounce back from email sent to sysaidcss (30-09-09)
SysAid CSS Forum: Escalation rule to email to a non-user (30-09-09)
Helpdesk: Email to SMS issue in escalation rule (30-09-09)

Recent Forum Notifications

Following successful login, you can commence to deploying and configuring the system.

The Three Interfaces in SysAid

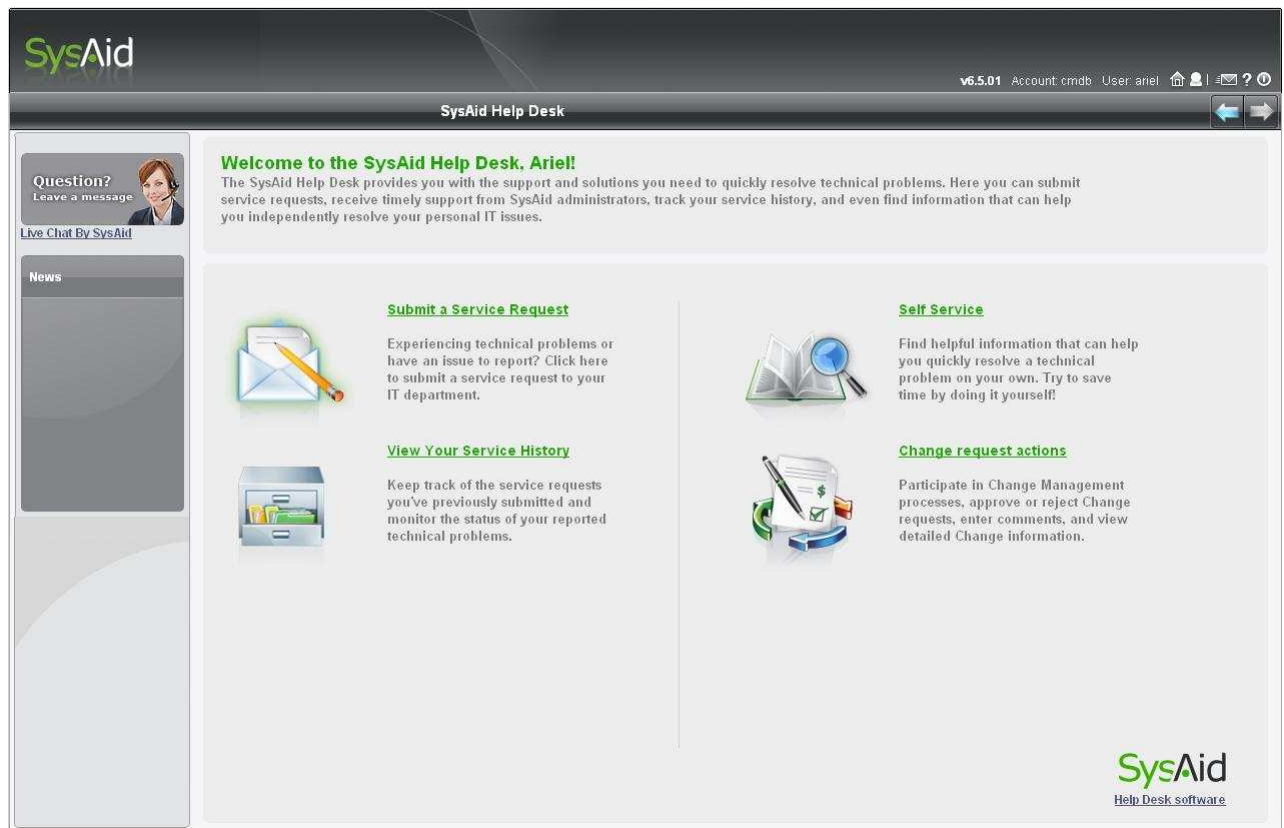
SysAid contains three portals: the end user interface, the administrator interface, and the manager interface.

In SysAid there are three types of user: end users, administrators and managers. The **end users** can submit service requests via the SysAid interface, email, telephone or a customized web page. The **administrators** are able to respond to incoming service requests, to configure settings in the help desk and asset setting, or in the Projects and Tasks SysAid modules. The **managers** can review, generate and send automatically scheduled reports, as well as to have a quick overview through the dashboard in the **Manager Dashboard**.

End User Interface

From this portal the end user can access several pages: the submission form for sending his/her service requests; self service page, to review common problems (if enabled); a page to review old service requests, and a page to re-design their own user settings. End users can search, print, or export to a CSV file their own service requests. End users who are supervisors can also view their supervised service requests. The end user has no access to the administrator interface or to the Manager Dashboard.

5 End user interface



Administrator interface

From the administrators portal you can set and control the help desk, the inventory, the tasks/projects modules, all the administrators and all your end users settings. You can also run reports using the Analyzer from this interface. Those administrators who are defined as SysAid Administrators have access to a wider range of options and settings. Ordinary administrators do not have access to the Manager Dashboard.

Manager interface

SysAid managers log into an interface designed especially for them. Here you can immediately see the main four dashboard charts, which provide an instant

picture of the current state of affairs in your IT department. The Manager Dashboard also includes various reports and tools to assist you with running and modifying them for your specific needs. To learn more about SysAid Manager Dashboard, please go to chapter 11: **SysAid Manager Dashboard** in this guide.

Related Guides and Reading

Guide 1: Installing the SysAid Server

http://www.ilient.com/down/installation_guide.PDF

Guide 3: Getting Started Guide

http://www.ilient.com/down/getting_started.PDF

Guide 10: Manager Dashboard Guide

http://ilient.com/down/manager_portal.pdf

Chapter 3 - Setting Up Users

- **SysAid** is highly customizable: You can add or remove users or fields, redefine your forms and interface or adjust your translation of the system quickly, with only a few clicks
- Suitable for technical and non-technical users, **SysAid** is **intuitive** and easy to use
- Service requests can be placed in a **knowledgebase**, which can be searched easily
- End users and administrators are **automatically notified** about new, modified and escalated service requests

In SysAid you need to set up new administrators and end users; and to add the user information for both administrators and end users. This task is performed by an administrator.

In SysAid there are three ways you can add administrators and end users.

- ➡ **Manual Set Up.**
- ➡ **Import users via lightweight directory access protocol (LDAP)**
compliant directory software, e.g. Active Directory.
- ➡ **SysAid can create an end user automatically**

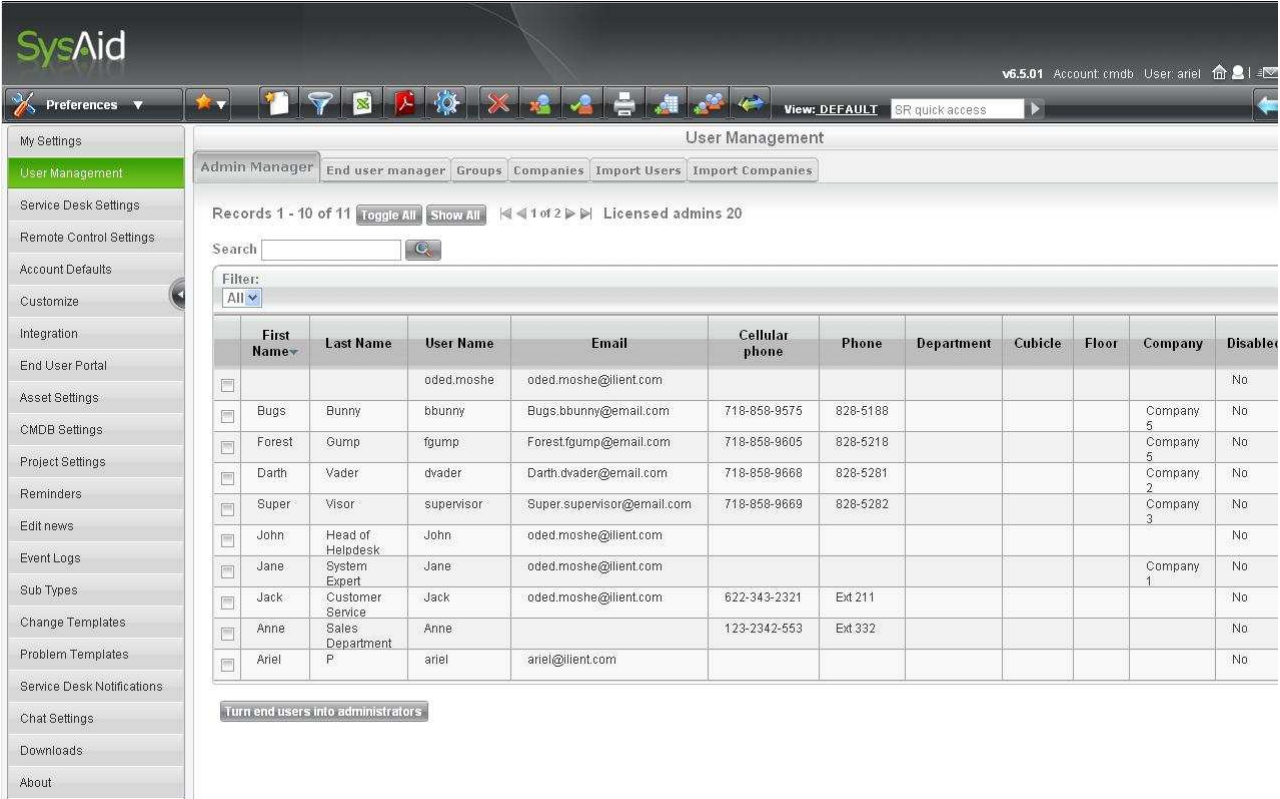
This chapter will describe the different ways to add users.

Manual setup

Add New Administrators


1. To add a new administrator in SysAid, go to **Preferences → User Management → Admin Manager tab**.

6 Admin Manager Tab



The screenshot shows the SysAid Admin Manager interface. The left sidebar contains a 'Preferences' menu with 'User Management' selected. The main area is titled 'User Management' and includes tabs for 'Admin Manager', 'End user manager', 'Groups', 'Companies', 'Import Users', and 'Import Companies'. The 'Admin Manager' tab is active, displaying a table of administrators. The table has columns for First Name, Last Name, User Name, Email, Cellular phone, Phone, Department, Cubicle, Floor, Company, and Disabled. The table lists 11 records, including users like 'oded.moshe', 'Bugs', 'Forest', 'Darth', 'Super', 'John', 'Jane', 'Jack', 'Anne', and 'Ariel'. A 'Turn end users into administrators' button is located at the bottom of the table.

First Name	Last Name	User Name	Email	Cellular phone	Phone	Department	Cubicle	Floor	Company	Disabled
		oded.moshe	oded.moshe@ilient.com							No
Bugs	Bunny	bbunny	Bugs.bbunny@email.com	718-858-9575	828-5188				Company 5	No
Forest	Gump	fgump	Forest.fgump@email.com	718-858-9605	828-5218				Company 5	No
Darth	Vader	dvader	Darth.dvader@email.com	718-858-9668	828-5281				Company 2	No
Super	Visor	supervisor	Super.supervisor@email.com	718-858-9669	828-5282				Company 3	No
John	Head of Helpdesk	John	oded.moshe@ilient.com							No
Jane	System Expert	Jane	oded.moshe@ilient.com						Company 1	No
Jack	Customer Service	Jack	oded.moshe@ilient.com	622-343-2321	Ext 211					No
Anne	Sales Department	Anne		123-2342-553	Ext 332					No
Ariel	P	ariel	ariel@ilient.com							No

2. To manually add a new administrator, click on the new  icon in the top left corner. You will reach a form (**New admin**) where you can input details for a new administrator.

7 Creating a new administrator

3. Fill out the **General Details** form and click **Ok**. You will be prompted with the following popup box message: "Would you like SysAid to email the new user his/her details?" Click **Yes**. The user will now be sent his/her username and password for accessing SysAid.

Add Supplementary Details on Newly Registered End Users and Administrators

Once you have added a user (administrator or an end user) you can insert additional details in the **Description** page. To access this page, click on the name of the user either in the **End User Manager** or **Admin Manager**; then click on the **Description** tab at the top of the page.

Administrator Settings

To customize your settings as an individual administrator, you should change the parameters in the **My Settings** page.

Go to **Preferences** → **My Settings**.

8 My Settings Page

The screenshot displays the SysAid web interface. At the top, the SysAid logo and version 'v6.5.01' are visible. The user is logged in as 'ariel'. The 'Preferences' menu is open, showing 'My Settings' as the selected option. The 'My Settings' page has tabs for 'My Settings', 'My Community Settings', and 'Favorites'. The 'My Settings' tab is active, showing various configuration fields. The 'Language' field is set to 'English (United States)'. The 'Time Zone' is set to 'EST (EST)'. The 'Date Input Style' is set to 'American'. The 'Encoding' is set to 'Unicode (utf-8)'. There are checkboxes for 'Enable automatic rotation of dashboard views' and 'Out of the office, assign all new requests to' with a button 'Assign all my active SR'.

Set Language Settings for Administrators

1. To change the language settings across your SysAid interface go to the **My Settings** page, and in the **Language** field select the desired language. Click on the dropdown menu to be able to select a language from the list. Make a note of this option as you need to select the same language in the **Translate** page later on.

2. In order to change the encoding so it will support reading and writing in your local language, move further down in the page, and click on the dropdown menu next to **Language**. Alter this setting to your desired language. For languages other than English, Dutch, French, German, Spanish, and Italian (Latin 1, en-iso-8859-1) you need to ensure that you select **Language: Unicode (UTF-8)** under **My Settings** and in **Account Defaults**.
3. Once you have completed the fields on this page, click **Save**.
4. Go to the **Translate** page (**Preferences** → **Customize** → **Translate**). At the top left hand side of the page, in the **Language** field, choose the language you set in the **My Settings** page (step 1). For languages other than English, Dutch, French, Hebrew, German, Spanish, and Italian, you will have to perform a one-time translation of all the term listed in the **Translate** page. Possibly, there is an available translation to your language in the SysAid Community:
<http://ilient.com/Sysforums/forums/list.page?listType=translations>
5. SysAid uses a dictionary file to support the various languages. You may change the terms for the supported languages and perform a one-time translation for new languages.

Set Signature

SysAid administrators can edit their own text used when sending messages through SysAid. Under **Preferences** → **My Settings** page, insert your signature in the text box, and click **Save**. Note that it is possible to use the tag “\$” in order to insert variables. See table 7 in this guide for a full list of possible tags.

9 Add signature

Signature (Auto Text)

Always happy to assist you,
\${ModifyUser}

Save

Out of Office

If you are going on a vacation and wish to direct your incoming service requests during the time you will be away to another member of the support team, you can do so simply by ticking a check box. Under **Preferences → My Settings** there is an option for an out of office support, that is, requests that are assigned to an administrator who is out of office, or are queued by routing rules to such an administrator, can be rerouted to an assigned available administrator instead.

Administrator Permissions

You can set for each administrator his/her permission level. Decide on what kind of access you want your administrators to have, and make your selection in the **Permission** tab (**Preferences → User Management → Click on the administrator → Permissions** tab). The **Permission** tab includes eleven potential

accessibility options available for an administrator. Here is an explanation of the different available permissions:

1. View Inventory

If you check the box next to this permission, the administrator in question will be able to view your network inventory. However, you can limit the administrator's view to a certain inventory group that you have set-up earlier on, by choosing the name of the relevant group from the dropdown menu which appears in this line.

2. Modify Inventory

If you check this box, the administrator in question will be able to modify the inventory of your network.

3. View Service Requests

Here you can choose to limit the service request the administrator can view. For instance, you can decide that this administrator will see only service requests that are assigned to him/her or to his/her admin group. Also, it is possible to choose that this particular administrator will not be able to see any service requests at all, simply by un-checking the box.

4. Modify Service Requests

Here you can choose to limit the service request the administrator can modify. For instance, you can decide that this administrator will be able to modify only service requests that are assigned to him/her or to his/her admin group. Also, it is possible to choose that this particular administrator will not be able to modify any service requests at all, simply by un-checking the box.

This is a special permission for an administrator to purge a service request. If you check the box, this administrator will be able to delete any service request from your database.

6. View Projects

This box can only be checked in the full edition of SysAid, and only if you have purchased the Projects and Tasks module. To learn more about the Full SysAid edition, please follow this link: <http://ilient.com/fullversion.htm>. Here you can choose whether a particular administrator will be able to view all or some of the projects. You can limit the administrator's view of the projects according to the administrators/admin groups that these projects are assigned to. Simply select the relevant names from the dropdown menu. Note, however, that you first have to define projects and assign them to administrators or groups to be able to define this viewing permission (**Tasks/Projects**→ **Project List**→ click a row entry→ **General Details**→ **Project Manager**)

7. Modify Projects

This box can only be checked in the full edition of SysAid <http://ilient.com/fullversion.htm> and only if you have purchased the Projects and Tasks module. Here you can choose whether a particular administrator will be able to modify all or some of the projects. You can limit the administrator's permission to modify the projects according to the administrators/admin groups that these projects are assigned to. Simply select the relevant names from the dropdown menu. Note, however, that you first have to define projects and assign them to administrators or groups to be able to define this modifying permission (**Tasks/Projects**→ **Project List**→ click a row entry→ **General Details**→ **Project Manager**)

8. View Analyzer

By checking this box you will enable the administrator an access to the analyzer function, so the administrator will be able to generate reports about workflow and service quality. To learn more about the analyzer function, please go to Chapter 9 in this guide.

9. Remote Control

By checking this box you will allow a particular administrator to remote control other computers in the network. You should also set the remote control permissions for particular workstations. To learn more about remote control, please go to the section *Remote Control Settings* in Chapter 5 in this guide.

10. Limit to its company data only

If you have set up different companies that different administrator belong to, by checking this box you can limit each administrator to its company data only.

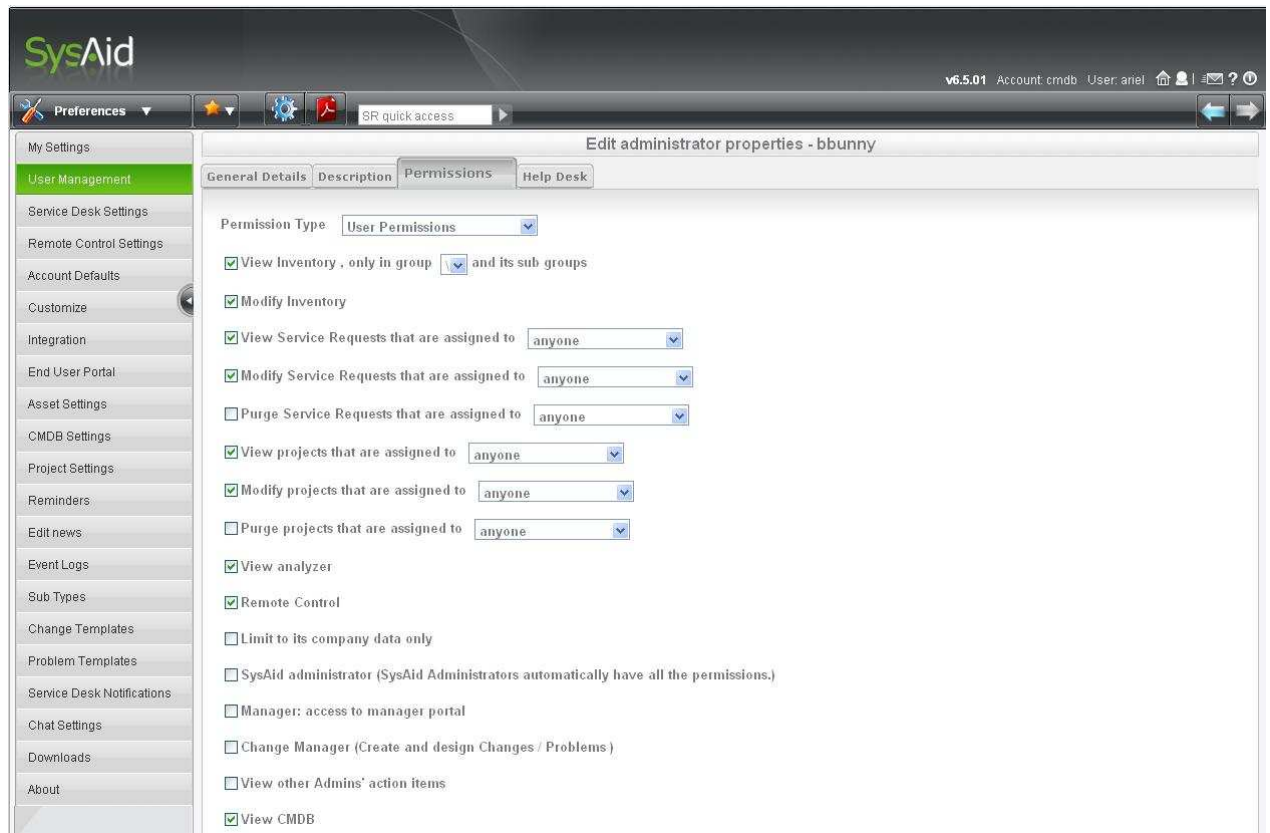
11. SysAid Administrator

Enabling the checkbox next to this option will permit the administrator to change items accessible via the **Preferences** submenu.

12. Manager


Checking this box will determine the administrator as a SysAid Manager, and enable him/her access to the Manager Dashboard. To learn more about SysAid Managers, please go to Chapter 11 in this guide.

10 Administrator Permissions



Adding New End Users Manually

Add New End Users

1. Go to **Preferences** → **User Management** → **End User Manager** to add new end users.
2. To manually add a new user, click on the **New**  icon in the top left corner. You will reach a form called **New End User** where you can input details for a new end user (Figure below)

11 New End User

The screenshot shows the SysAid web interface for creating a new end user. The top navigation bar includes the SysAid logo, version v6.5.01, and user account information. The left sidebar contains a menu with 'User Management' selected. The main content area is titled 'New end user' and features a 'General Details' tab. The form fields include: User Name, Password (with a 'Generate random password' button), Confirm Password, First Name, Last Name, Email, Text message, Phone, Cellular phone, and Company (a dropdown menu). At the bottom of the form are 'Ok', 'Cancel', and 'Apply' buttons.

3. Fill out the **General Details** form and click **Ok**. You will be prompted with the following message: Would you like SysAid to email the new user his/her details? Click **Yes**. This will enable your new users to receive an email with their login details.
4. You will automatically return to the **End User Manager** page; here you will see listed the newly added end users.

Setting Up Account Defaults for All End Users

In the sidebar, click **Preferences** → **Account Defaults**. Since you will create more users, the account-defaults can save you time, by providing automatic settings for those users. Specify the settings you would like most users to have.

12 Setting account defaults for all users

The screenshot shows the SysAid web interface. The top bar includes the SysAid logo, version 'v6.5.01', and user information 'Account cmdb User: ariel'. The left sidebar contains a 'Preferences' dropdown and a list of settings categories. 'Account Defaults' is selected and highlighted in green. The main content area is titled 'Account Defaults' and contains the following settings:

- Language:** English (United States) (dropdown menu)
- ☒ Use the Default language for automatic notifications.
- Time Zone:** EST (EST) (dropdown menu)
- Date Input Style:** American (dropdown menu)
- Encoding:** Unicode (utf-8) (dropdown menu)
- Font Size:** Small (dropdown menu)
- ☒ Case insensitive login names
- Spell Checker language:** English (US) (dropdown menu)
- Mail Domain:** (text input field)
- Export/Import/Encoding:** English (en-iso-8859-1) (dropdown menu)
- Organization name:** (text input field)
- ☒ Require the Admin to add a note when the settings are changed.
- Save** (button)




You should select the appropriate option from the dropdown menus to encode email text and attachments in the **Export/Import/Encoding** option.

Language Set Up for End Users


To set up language setting follow the instructions above (**Set Language Settings for Administrators**).

Removing Users from SysAid

Delete End Users

In the **End User Manager** page you can delete an end user from the list. Select the end user/s to be deleted by clicking the tick box next to their name, then click on the **Delete** button  on the top menu bar. To just disable an end user, rather than delete him/her for good, select the end user/s to be deleted by clicking the tick box next to their name, then click on the **Disable**  button on the top menu bar. Similarly, to reverse this action and re-activate this user, check the tick box next to that end users' name and then clicking the **Enable** button .

Delete an Administrator

You can delete administrators in the **Admin Manager** tab. Enable the check box next to the name of the administrator you wish to delete. Click the **Delete** button  on the top menu bar. A popup box will open, asking you to "Transfer all duties of (Deleted Administrator) to (New Administrator)".


13 Transfer Duties Popup



In the dropdown box select the administrator who will take on these duties. From **edition 3.1.3** only the main administrator can be deleted, follow the previously described instructions. However, it is not recommended to delete the main administrator, as this is the only user who can deal with troubleshooting LDAP.

Setting Up a Department Field for Users

To assist in registering your end users you can add their department details so as to help the IT department when responding in person to service requests. Setting up department field for users is necessary if you wish to nominate end-users as department supervisors. See **Chapter 8 Managing Help Desk - Advanced Settings** in this guide to learn more about supervisors.

1. To add a **Department** dropdown menu field, go to the **General Details** page.
2. Click on the Customize  icon.
3. A popup screen will open, called **Design Form**. In the box called **Available Fields** select the **Department** field. Click on the arrow button to move it to the **Visible Fields** box.
4. Click **Save**. This new field will now appear in the page.

To set up the contents of the **Department** dropdown menu:

1. Go to **Preferences → Customize → Customized Lists**.
2. In the **List** dropdown box select **Department**.
3. You should use a numeric figure in the **Key** box. Add the text description in the caption box. Click **Add** to save this line entry.
4. You can adopt any numerical coding sequence (1, 2, 3, 4, 5 or 10,11,12,13,14 etc.) You cannot use the same number twice as this causes the entry to be overwritten. Do not punctuate numbers with commas "," or with full stops "." Also, please keep a continuous sequence, to prevent future breaches.
5. Once you have added all entries to the dropdown menu, click **Save**.

Now you should be able to see the new dropdown menu on the **General Details** page.

Dividing Users into Companies

If you are a helpdesk provider and have outsourced your help desk facility, or are the mother company that provides all the IT services for all associated companies, the facility that enables you to divide users into companies is greatly beneficial. To learn more about creating companies and user groups, please check section 4.2 in this guide: **SysAid Help Desk- How to Optimize your Workflow**.

Also, dividing users into companies is necessary in case you wish to determine end users as company supervisors. To learn more about supervisors, please go to **Chapter 8 Managing Help Desk - Advanced Settings**

Import users with lightweight directory access protocol (LDAP)

Importing users and user information into SysAid using lightweight directory access protocol (LDAP) compliant directory software has several benefits:

LDAP -The Benefits

1. Allows to continue using the username and password your users currently have on your network to access SysAid.
2. Preserves central location of directory of information on users (address, telephone and cellular phone numbers).
3. Saves time. IT administrators do not have to build new directories and add user information manually.
4. No duplication of user data.
5. The basis for using single-sign on. Avoids double logins.
6. An option for secure integration

The most common LDAP compliant software used is Active Directory. If this is what your organization uses you can easily integrate Active Directory with SysAid. If you integrate users with LDAP, SysAid will treat that information as read only data. Therefore any changes that are made to current users should be made to the Active Directory itself. SysAid will then upload the changes once the user logs in or if you "**Refresh from LDAP**" and have not disabled that user.

SysAid LDAP Wizard

Importing Users with an LDAP Compliant Directory

The full edition of SysAid imports users and authenticates users by implementing LDAP integration. To learn more about SysAid Full edition, please follow this link: <http://ilient.com/fullversion.htm> You can use any application that can read an LDAP directory or is directory enabled, for example Microsoft Active Directory, Open LDAP or Novell LDAP.

During installation you should have configured SysAid to work with your LDAP compliant directory, for example Active Directory. If you did not manage to do this during installation you can configure the Active Directory integration in the LDAP Configuration Wizard within SysAid.

LDAP Configuration Wizard

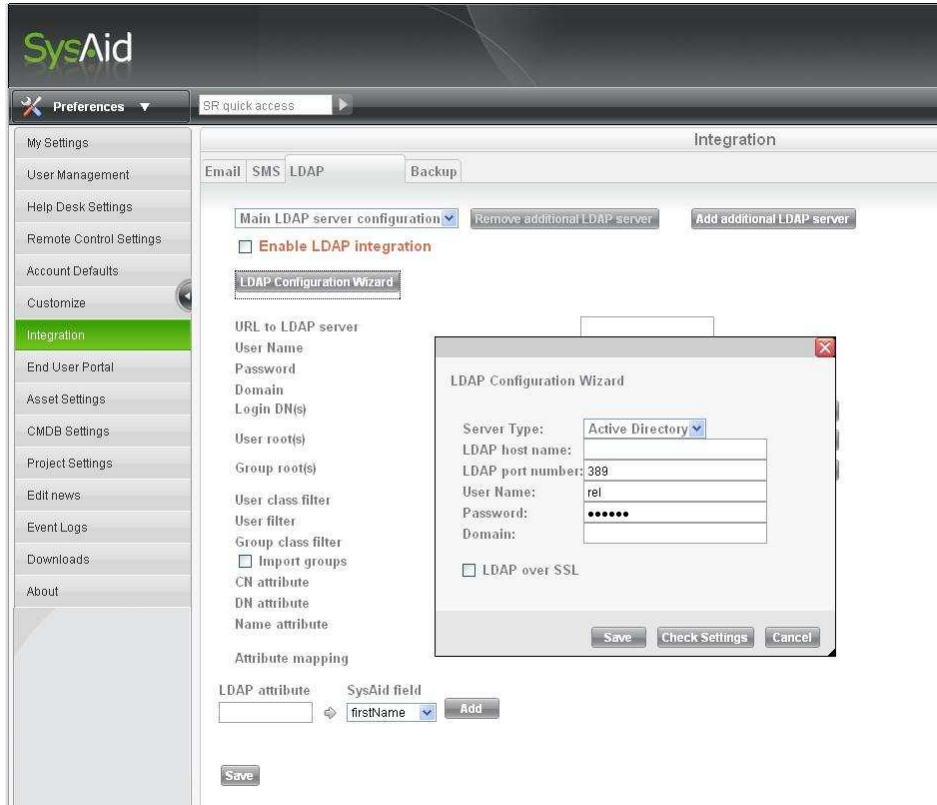
1. To integrate SysAid with your LDAP compliant software, for example Active Directory go to **Preferences** → **Integration** → **LDAP** tab.

14 LDAP Integration

The screenshot shows the SysAid web interface for LDAP integration. The left sidebar lists various settings categories, with 'Integration' highlighted. The main content area is titled 'Integration' and contains tabs for 'Email', 'Text message', 'LDAP', and 'Backup'. The 'LDAP' tab is selected, showing the 'Main LDAP server configuration' section. This section includes a checkbox for 'Enable LDAP integration' and a 'LDAP configuration wizard' button. Below these are several input fields for LDAP server details: 'URL to LDAP server', 'User Name', 'Password', 'Domain', 'Login DN(s)', 'User root(s)', and 'Group root(s)'. There are also fields for 'User class filter', 'User filter', 'Group class filter', and 'Import groups'. A table lists LDAP attributes (CN, DN, Name) and their corresponding SysAid fields (cn, distinguishedName, sAMAccountName). At the bottom, there is an 'Attribute mapping' section with a table for mapping LDAP attributes to SysAid fields, and a 'Schedule; Start time' section with a date/time picker and a 'Run every' dropdown.

2. Click on the **LDAP Configuration Wizard** button. A popup screen will open. Check that all the fields are complete. Make sure you complete the following four fields: LDAP host name, user name, password, and domain. For the **Username** and **Password** fields, you can use any username that has read only permission.
3. Note that you can check the appropriate box in the wizard for a secure LDAP SSL integration.

15 LDAP Configuration Wizard



Click **Check Settings** and then **Save**. If you receive an error message verify that you have not made any spelling mistakes. In case the error message persists, please send the error message to SysAid support.

4. If you successfully saved your settings, complete the main **LDAP Server Configuration** page with all the required fields. Check the box "Enable LDAP integration" at the top of the page.
5. Click **Save**.

Using Two or More LDAPs

SysAid can be integrated with more than one LDAP compliant directory. This integration will mean that end users will have to add a domain name before their user name. Once you have integrated from one LDAP, click **Add** at the

bottom of the page and complete the **LDAP Server Configuration** page with all the required fields. Click **Save**.

Final Step - Integration

1. In order to integrate your users from your Active Directory into SysAid, go to **Preferences → User Management → End User Management**.
2. Click **Refresh User List from LDAP**. Check to see if your users were successfully imported. If you do not see all of your users, please contact Ilient support team.

When users are deleted from the LDAP SysAid will automatically mark them as disabled when it is auto-refreshed.

Scheduled LDAP refresh

You can schedule an automatic refresh from LDAP, on pre-defined intervals (once a day, once a week or once a month) according to your preferences. Go to **Preferences → Integration → LDAP** tab, and choose your auto refresh settings.

Single Sign on

Single Sign On has great benefits for your users. Once a user has signed on to their network at the start of the day, no further login is required for SysAid. You bypass the login screen. To set up this option please contact support@sysaid.com with the following details: Your LDAP compliant software (version number), and whether you have IS integration.

Importing and updating users and companies from a CSV file

In case you do not use LDAP integration with SysAid, you can import both users and companies from a CSV file.

Go to: **Preferences → User Management →**

Import Users or Import Companies tab

In this page you need to set the different columns in your CSV file to suite the parallel fields in SysAid.

Since the username has to be unique for each user in the system, it is recommended to set the email address as a username.

When importing users, if SysAid recognizes in the user field a company name that is not yet registered, SysAid will automatically add this company to your list of companies. In addition, if you import another CSV file with other users from the same company, SysAid will automatically register all the relevant users under the same company.

However, for the department field, or any other customized list field, SysAid will not create new text values, and therefore you need to make sure all the text values in your CSV file are paralleled in SysAid. If a new value which does not exist in the field you have customized in SysAid appears in your CSV file, SysAid will ignore this value.

For instance, if you have set your department list in SysAid to include the following departments: *Management*, *Marketing*, and *Support*. Yet, in the CSV file there is also a *Development* department value, SysAid will ignore this value. To fix this, simply set a new department value: *Development*, and then upload your CSV file again. SysAid will automatically scan for fields that need to be updated, update changes and insert new information.

To set the *Development* field in your *Department* List go to:

Preferences → Customized Lists tab.

From the List dropdown menu choose your list (for example, *Department*), and insert a key number and a caption: *Development*. Click **Save**


Now, import again your CSV file. SysAid will scan for the fields that need to be updated and will be able to recognize the text value “Development” for the department list. So, SysAid will add the information regarding this department while importing the CSV file.

16 Adding a department to the Departments list in SysAid

The screenshot shows the SysAid web interface. On the left is a sidebar menu with options like 'My Settings', 'User Management', 'Help Desk Settings', 'Remote Control Settings', 'Account Defaults', 'Customize' (highlighted), 'Integration', 'End User Portal', 'Asset Settings', 'CMDB Settings', 'Project Settings', 'Edit news', 'Event Logs', 'Downloads', and 'About'. The main area is titled 'Customize' and has tabs for 'Customized Lists', 'Customized Notifications', 'Translate', 'Appearance', 'Web Forms', and 'Customized Forms'. Below the tabs, a message says 'Please choose from the menu a list to customize.' There is a 'List' label and a dropdown menu currently set to 'Department'. Below this is a table:

Key	Caption	Actions
4	Department	<input type="button" value="Add"/>
1	Management	<input type="checkbox"/> Delete
2	Marketing	<input type="checkbox"/> Delete
3	Support	<input type="checkbox"/> Delete

Below the table is a 'Save' button.

You may also import administrators and end users from a CSV file under Preferences→ **User Management**→ **Admin/End User Manager**→ **Import Users** tab. If you wish to direct SysAid to re-perform the import of users during specified intervals, check the box below the table to schedule an import. Insert a start time, or click the calendar icon  to choose a start date for the scheduled import. Choose from the dropdown menu how often you wish SysAid to perform the import, and specify the path of the Excel file which contains the users data. Click **Save Fields** to save your preferences, and **Submit** if you wish to perform the import immediately. Note that by importing users you can also update all the fields for the existing users.

17 Import End Users from CSV File

v6.5.01 Account: cmdb User: aniel

Preferences SR quick access

User Management

Admin Manager End user manager Groups Companies **Import Users** Import Companies

Input file

☐ Do not import the head line (the first line)

☐ Generate passwords (Notification by E-Mail).

☐ Use the E-Mail as the user name.

Number of fields

Read csv file from line number:

Position	Field content	Format
1	Do not import field	
2	Do not import field	
3	Do not import field	
4	Do not import field	
5	Do not import field	
6	Do not import field	
7	Do not import field	
8	Do not import field	
9	Do not import field	
10	Do not import field	

☐ Schedule; Start time: 10-06-2009 07:49 Rerun every: Day

File path:

Administrator/s- The Main Administrator

During the installation process of SysAid you were requested to enter details to setup your first Administrator. This user is referred to as **SysAid Main Administrator**.

In extreme cases where you do not have an access to SysAid, you may use the included utility to reset this main Administrators password and this will allow you access.

It is recommended not to delete the SysAid main administrator, although you may disable it for licensing purposes.

Create Administrators

Following a fresh installation of SysAid, and after completing LDAP integration, all users can be viewed in the **End User Manager** tab. No administrators exist apart from the main administrator at this stage. Therefore only one entry will appear in the **Admin Manager** tab. **Administrators** are authorized to manage assets, change settings, and respond to service requests. You should now create your administrators.

1. Go to **Preferences** → **User Management** → **Admin Manager**.
2. Click on the "Turn end users into administrator" button.
3. A popup screen will appear. Click on the box next to those usernames whom you wish to turn into administrators.
4. Or, if you know the exact username, type it into the caption box next to **Filter**, at the top of the page. Click on the box next to the name.
5. Now click the **Select** button.
6. These users will now appear on the **Admin Manager** page, which indicates that they are administrators.

Change end user account information when integrating from a single LDAP.

End users with a username and password in SysAid can submit service requests. The interface they interact with is the **End User Portal**. Alternatively, they can submit their requests via an email account. If you do not use single sign on, your SysAid users can login to SysAid by employing the same username and password they use to access the network. In order to change account information imported from LDAP, for example, password or add a new user, you can change this information in the Active Directory.

1. In SysAid go to **Preferences** → **User Management** → **End User Manager** tag. Click on the **Refresh from LDAP** button.
2. Once you have refreshed from LDAP, perform a quick check of the end user entry to ensure that the changes took effect.

Change end user account information - when using two or more LDAPs or when having moved to a new LDAP.

If you have moved from one LDAP to a new LDAP or have two or more LDAPs set up (two or more domains), and after you have made changes in the Active Directory, before pressing the **Refresh from LDAP**, you should delete all end users in SysAid.

1. Go to **Preferences → User Management → End User Manager**.
2. Click Toggle All, and on the top menu bar click the **Delete** button




3. You can now click **Refresh from LDAP**.
4. You will have to create your administrators again if this action does not follow a fresh installation of SysAid.
5. Users will login to SysAid using the following construction:
domain/username

SysAid Licenses

First, to verify that SysAid is successfully integrated with your LDAP compliant directory, count the amount of users in your directory. You can see your license details under **Preferences→About**. Count also those users who appear in SysAid, irrespective of the status (Disable). The bottom of the page will state how many records you have. If these numbers are not the same, please contact Ilient support.

SysAid counts the number of users imported from LDAP and reconciles this with the number of licenses purchased. Following integration with LDAP, SysAid duplicates the information in LDAP. SysAid keeps a list of users and their information. To check username and passwords and to maintain information on users, SysAid checks with your LDAP compliant directory.

In SysAid you have the option to **Disable**  users so that your number users will equal the total number of licenses you have bought. When you disable a user, what in effect you do is make a note to SysAid not to take this user under consideration while counting license numbers, and not to update this user's information. The disabled user will still be listed under your user list but will not be counted, and cannot login to SysAid.


Do not use the **Delete** options to disable users following LDAP integration. If you delete an end users from SysAid, when you **Refresh from LDAP**, this user will appear again, because SysAid does not have a way of differentiating between new and deleted users. In other words, SysAid does not know if this user was listed once and was once deleted and therefore should not be imported again.

Therefore, it is preferable to mark to SysAid all those users that do not need access to SysAid as **disabled**. They will still show up under your end user list, yet, you make a note to SysAid to ignore the disabled users when counting licenses.

If you do not ensure that numbers of licenses = end users plus administrators and managers SysAid will automatically and randomly disable some accounts, so that the quota of licenses can accommodate the amount of users in SysAid.

Disable End Users

1. First view all end users imported into SysAid. Go to **Preferences** → **User Management** → **End User Manager**.
2. To **disable** an end user, click the check box next to the user name.



3. In the top menu bar click the **Disable** button . The page will refresh and in the column titled "Disabled", **Yes** will now appear. Even if you "**Refresh from LDAP**", the disabled end users will remain so in SysAid.


Support and upgrade information

Under **Preferences**→**About** you can see the statues of your SysAid maintenance and verify it is still valid. You can also check the amount of licenses for your assets, end users and administrators.

Check how many enabled users you have in SysAid.

This can be preformed after you have purchased a certain amount of licenses. In order to perform a number check on the amount of active users you have in SysAid, you should use the filter option. Once you have disabled end users, you can check for the total amount of active users.

1. Go to **Preferences** → **User Management** → **End User Manager**. Click on the **Filter** icon .
2. The Query Builder screen will open. In the **Choose Element** dropdown box select **Disabled**. In the last box (the Yes/No dropdown box) select **No**, for a list of enabled end-users. For a list of disabled end users select **Yes**.
3. Finally click on the **Create This Filter** button.
4. The **End User Manager** page will appear and show the results of the filter.
5. To print the results, right click on your mouse; select **Print** from the menu.
6. Click on the **Filter**  icon again and then click the **Reset Filter** button. If you do not reset the filter, the **End User Manager** page will permanently retain the filter settings.

7. To have both disabled and enabled end users in one file you can export the results to Excel. Click on the  **Export to CSV** icon. You will end up with two Excel files, one with disabled users and one with enabled users. For your convenience, you can cut data from one file and paste it into the other for easy viewing.

Finally if you discover that the number of users does not match the enabled amount, check if any LDAP/AD accounts were locked in LDAP/AD, and may prevent refreshing the user list from LDAP. After the procedure is done, check if the users you have enabled can login in to SysAid.

If you will have more users logging in to SysAid than the license agreement allows, and require more licenses, please contact our sales department sales@sysaid.com

Additional AD/LDAP Options

For further information on Novell LDAP servers or Open LDAP, please contact us for instructions: support@sysaid.com.

As of SysAid release 5.5, the SysAid Audit log has been improved, and it can now be accessed from within SysAid interface. The SysAid Audit Log allows you to filter information, as well as perform a search. Also, the user login failure information is recorded in the Audit log.

Go to **Preferences→ Event Log** to see and search your information.

On top of the automatic events that are entered in the event log, whenever a change is made in SysAid main settings by an administrator, SysAid requires a note to be entered and records the date, the time and the user who performed

the changes in the event log. You may choose to enable or disable this feature under **Preferences → Account Defaults**.

18 Audit log

The screenshot displays the SysAid Event Logs interface. On the left is a sidebar menu with various settings categories. The main area is titled 'Event Logs' and contains a table of audit records. The table has columns for Time, Module, Sub module, Type, Severity, User Name, and Info. The records show various system updates and configuration changes performed by users like 'oded.moshe' and 'SysAid'.

Time	Module	Sub module	Type	Severity	User Name	Info
9/30/09 12:41 PM	Preferences	SysAid Configuration	Update	Info	oded.moshe	Updating the tab of the Form - CIEdit(\$resource.getString('CIEdit details'))
9/30/09 12:27 PM	Preferences	SysAid Configuration	Update	Info	SysAid	Account load - Create CI Sub Types For Asset Types.
9/30/09 12:25 PM	Asset Management	Discovery Service		Info	Snmp discovery service - SysAid Server	Starting Discovery Server...
9/30/09 12:19 PM	Preferences	SysAid Configuration	Update	Info	oded.moshe	Updating the tab of the Form - CIEdit(\$resource.getString('CIEdit details'))
9/30/09 9:32 AM	Preferences	SysAid Configuration	Update	Info	oded.moshe	Updating dashboard view.
9/30/09 9:31 AM	Preferences	SysAid Configuration	Update	Info	oded.moshe	Updating dashboard view.
9/30/09 9:30 AM	Preferences	SysAid Configuration	Update	Info	oded.moshe	Configuring dashboard.
9/30/09 9:29 AM	Preferences	SysAid Configuration	Update	Info	oded.moshe	Configuring dashboard.
9/30/09 7:38 AM	Preferences	SysAid Configuration	Update	Info	oded.moshe	Updating dashboard view.

SysAid automatically creates an end user

When a user submits a service request from a computer which does not have a user already registered with SysAid, SysAid can automatically add that person as a new user.

1. Go to **Preferences → End User Portal**.
2. In the **End User Portal Settings** page you can enable the following box:

☐ When a Service Request is submitted from an asset, automatically create a user account for the user of this asset, if no such account already exists.

Now, an end user submitting a request from SysAid interface will be added as a new user by SysAid.

This option is not applicable if you are using Active Directory or another LDAP compliant software.

Chapter 4 Help Desk - An Overview

4.1 The Help Desk Interface

The Service Request

A service request is a form that details the end user's request for support from the IT Department. Often it describes a problem, for example, trouble with hardware or the failure of a printer to function. The main way an end user can submit a service request to SysAid is via the end user interface. The end user accesses this form by pressing the hot key (F11), he/she fills out the form and then clicks the **Submit** button. The end user will then see the "Thank-you" page with the number of the service request he/she has submitted.

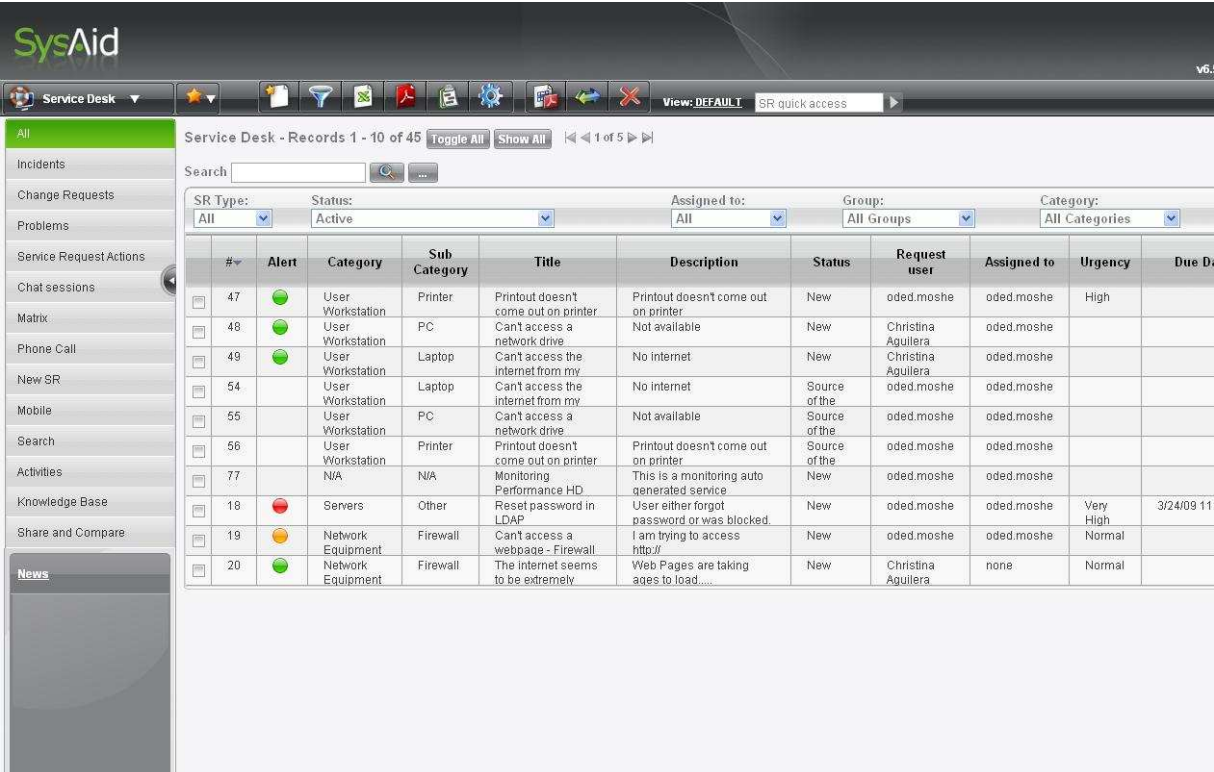
19 Submit Service Request Form - end user interface

The screenshot shows the SysAid web interface for submitting a service request. The header includes the SysAid logo and user information: v6.0.01, Account: cmdb, User: ariel. The main form is titled 'Submit Service Request' and contains the following fields:

- Quick List Description: Select Quick List (dropdown)
- Category: Please select a category. (dropdown) Please select a sub-category. (dropdown)
- Title: (text input)
- Description: (text area)
- Urgency: Low (dropdown)
- Asset: Not associated to asset (dropdown)
- Attachments: (list with Add and Remove buttons)
- Submit (button)

After the administrator logs into SysAid they can easily preview all service requests that require a response by clicking on the **Help Desk** from the sidebar menu. Alternatively, the administrator can also view only a selection of the service requests list, by activating one of the six filter menus located above the list (Status; Assigned to; Group; Category: Urgency and Priority).

20 Service Request List



Service Desk - Records 1 - 10 of 45 [Toggle All](#) [Show All](#) [1 of 5](#)

Search

SR Type: [All](#) Status: [Active](#) Assigned to: [All](#) Group: [All Groups](#) Category: [All Categories](#)

#	Alert	Category	Sub Category	Title	Description	Status	Request user	Assigned to	Urgency	Due Date
47	Green	User Workstation	Printer	Printout doesn't come out on printer	Printout doesn't come out on printer	New	oded.moshe	oded.moshe	High	
48	Green	User Workstation	PC	Can't access a network drive	Not available	New	Christina Agullera	oded.moshe		
49	Green	User Workstation	Laptop	Can't access the internet from my	No internet	New	Christina Agullera	oded.moshe		
54		User Workstation	Laptop	Can't access the internet from my	No internet	Source of the	oded.moshe	oded.moshe		
55		User Workstation	PC	Can't access a network drive	Not available	Source of the	oded.moshe	oded.moshe		
56		User Workstation	Printer	Printout doesn't come out on printer	Printout doesn't come out on printer	Source of the	oded.moshe	oded.moshe		
77		N/A	N/A	Monitoring Performance HD	This is a monitoring auto generated service	New	oded.moshe	oded.moshe		
18	Red	Servers	Other	Reset password in LDAP	User either forgot password or was blocked.	New	oded.moshe	oded.moshe	Very High	3/24/09 11:11
19	Yellow	Network Equipment	Firewall	Can't access a webpage - Firewall	I am trying to access http://	New	oded.moshe	oded.moshe	Normal	
20	Green	Network Equipment	Firewall	The internet seems to be extremely	Web Pages are taking ages to load.....	New	Christina Agullera	none	Normal	

Click on any row entry to open and read a service request. As a result, the **General Details** page (Figure 18) of that particular service request will be displayed.

21 General Details of a Service Request

Under the **General Details** page you can see the title and the body of the service request, the dates of all correspondences relating to this request, its category, priority, who it was sent to, the general details of the submit user, and various other details. The General details form of a service request can be customized to include more suitable fields. To learn how to customize a form in SysAid, look at chapter 7 **Advanced Configurations**, under **Customize the form** in this guide.

From this page you can also turn the service request into a FAQ for your end users Self Service Portal, or a knowledgebase item, for other administrators. It is advisable to use this option in order to save time and effort. Service requests that tend to repeat themselves can be added to the list of frequently asked questions, to allow your end users to independently solve their problems, and at the same time be stored in your knowledgebase, so your administrators team could refer to it in the future.

You can also Upload and download items from the community to your local SysAid with a simple click!

<http://ilient.com/Sysforums/forums/sysaidinterfaces.page>

Each service request within SysAid contains a portfolio of information, which is divided into six pages. Each of these pages can be viewed by clicking on the named tab: **General Details**, **Description**, **Solution**, **Activities**, **Messages** and **History**. Tab names can be changed; tabs can be removed, or you can add your own new tabs. To learn more about creating new tabs, please check chapter 7 in this guide, under: **Create a New Form Tab in the Help Desk Interface using the Customize icon**

Following is an explanation about each of these tabs.

Solution Tab

22 The Solution tab

The screenshot displays the SysAid interface for a Service Request. The top navigation bar includes the SysAid logo, version v6.5.01, and user information. The left sidebar lists various system components. The main content area is titled 'Service Desk - Service Request #48' and features several tabs. The 'Solution' tab is currently selected, showing a 'Resolution' field and a 'Solution' field. Below these fields are action buttons: 'Send Message', 'Add to Knowledgebase', and 'Search Knowledgebase'. A section titled 'Linked Service Items for Service Item #48 - Records 1 - 1 of 1' contains a table with the following data:

Linked Item Type	ID	Title
Problem	52	SysAid ITIL Problem

At the bottom, there is a section 'Add a new link from type:' with a dropdown menu set to 'Service Item' and an 'Add' button.

This screen provides two free text areas: **Resolution** and **Solution**. These can be used by the administrator who handles the service request. As resolution, write the cause of the problem. In the Solution text area, describe how to fix the problem. These fields, too, are significant in searches.

If you click on the [Search Knowledgebase](#) link, SysAid will search for service requests with similar details. You can use the other links to send a message to the request user, or to add this service request to your knowledgebase.

Activities

On this screen, an administrator can record the hours spent on a particular service request. For each session of your work enter the date, start time, and end time. The amount of time spent is calculated automatically by SysAid. Provide a description of the work carried out and click **Add**.

Messages

Under this tab you can find all the messages sent and received regarding the service request in question. The messages are automatically time-stamped by SysAid.

You can decide whether you wish to see the automatic notifications related to this service request or not. SysAid is able to distinguish between messages and automatic notifications, and you can see them separately by clicking the button **Show/Hide automatic messages**.

All outgoing and incoming emails regarding a specific service request can be found under the messages tab. In order to see them, you need to make sure you have sent emails from within the service request. Then, all the outgoing emails you have sent to end users, and all their replies to you, will be listed here. To learn more about configuring incoming email messages, please check in Chapter 7 in this guide: **Replying to Service Requests**

History

The **History** screen supplies the record of a particular service request. The creation of the service request and every change made to it since, are documented here. The user who created or changed the service request, and the time he/she did so are also recorded on this page.

Creating Hierarchies

You can create hierarchies between service requests by inserting the 'Parent ID' for a service request, which will define it as a child request of the request you have specified. This will mean that the status of the parent request will influence the status of the child requests, and you will be able to see the connection to the child/parent requests from within any of these related incidents. When closing a service request that has child service requests, the solution field will be copied from the parent to its child service requests.

Locating Service Requests: Four Options

Before you can solve service requests by inputting a solution and resolution, you should locate them. There are several ways to locate service requests in SysAid.

- **List**

Help Desk → List

Click: **Help Desk → List** to open the service request. The service request list is comprehensive; it includes all the service requests that exist. By using one or more filters, however, you can restrict the list to what interests you. For instance, by clicking on the **Status** dropdown menu, you can review different lists of service requests divided according to the status. To open any service request for editing or rerouting, click on the row entry of that relevant request.

- **Matrix**

In the sidebar Click on **Help Desk → Matrix**. The **Service Request Matrix** page will open; you can view various tables that present the number of requests in aggregate. Clicking on any number will leads you to the requests themselves. To create a matrix, choose a horizontal field and a vertical field. The matrix will display the number of service requests matching both fields.

- **Search**

For searching the Helpdesk and the Asset lists, you can use the search window at the top of the list page.




Note that in the helpdesk list you can use the three dots button to limit your search for specific dates. Choose the start date and end date of either the time the request was sent, or the time in which the request was modified. Note that you can perform a search on any of the columns in any of the SysAid lists: service requests, contacts, assets, and more. The columns in which the expression you have searched for appear will be marked with an asterisk (*).


When you wish to perform a search on your database, click on **Help Desk → Search** in the sidebar. Here you can search for specific service requests. Into the search field, enter part or all of the text that might appear in the title of a service request, its description, category, or any other field. The search is not case sensitive and punctuation marks are optional. After you click **Search**, a

screen will appear with any matching service requests, best matches first. By default, only the knowledgebase - a group of especially important service requests - will be searched. You can search through all service requests by choosing the appropriate button.

Boolean logic is possible. The default is “Or”. For “And”, place “&&” between the words. By default, the search will find service requests that match any word you supply, not necessarily them all. To locate service requests that necessarily match two or more words place “&&” between those words. Placing quotation marks around two or more words is equivalent to placing “&&” between them.

- **Quick Access**



To access a SR by its ID, use the quick access box, available at the top bar of any page 

Click the question mark icon  for the Help files to learn about performing more complex searches.

Duplicating a Service Request

In some cases it is very useful to be able to duplicate a service request. For instance, when an end user sends a service request specifying two different problems. Let's say that the end user's screen flickers, and his mouse is broken. These are two different issues, that might have two different priorities and different due dates, but they were sent in the same service request.

You will need to create a duplicate and address each of the issues separately.

To create a duplicate, simply click the  **Duplicate** icon from any of the service request screens. You can easily delete a service request by clicking the Delete icon  at the top bar.

Customized printout

This feature enables you a wide range of customizations you can perform on the printout of a Service request, it uses an Excel sheet that you can customize to your needs (Fonts, colors , size, logos etc...) and merges it with selected data in the Service request.

In the installation directory under

C:\Program Files\SysAidServer\root\WEB-INF\conf\templates

you can find an XLS file: customized_printout.xls

This file is the default template used for your customized printouts.

23 Customized Printout Excel File

K15

File Edit View Insert Format Tools Data Window Help

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38

A B C D E F G H

SysAid

Details for Service Request number : 0

Title: 0

Desc: 0

0 is assigned to your request, please contact him for any inquiries

Signature: _____ Date: 22/03/2009

To merge the data in the service request to your customized printout, click the



Customize Printout icon from within the service request.

SysAid will check what tab you are in, and check the directory to see if there is an XLS file with the name of that tab. Note that spaces in the name are omitted.


If SysAid can find a XLS file with the same name of the tab, it will use the tab and xls file to perform a merge between the fields you have selected, and your Excel template.

If SysAid cannot find a matching template, SysAid will use the default XLS file (you can see in the screenshot above) and merge it with the cells under the customized printout tab you are in.

As long as you name your XLS templates and locate them appropriately, you can manage as many templates as you wish. You can activate your different templates by clicking the icon under each tab in the SR.

You may change and adapt the default template, too. Your modifications will be saved for future upgrades of SysAid. New templates will be provided in future SysAid upgrades, under new names.

Favorites

To be able to easily and quickly reach any page in SysAid that you need more highly available, you can add the page to your SysAid favorites menu, simply by clicking the star icon at the top bar of that page screen . A popup window opens, asking you to insert a caption for the favorite page, and specifying its URL. Click 'OK/Apply' to save the page as a favorite.

4.2 SysAid Help Desk - How to optimize your work flow

Help Desk provides a single point of contact for employees and customers for their IT problems. It is set up to facilitate the restoration of normal operational service with minimal business impact and is the place where vital day-to-day communication takes place between users, IT support administrators and third party support organizations (if applicable).

The Help Desk also functions as a repository of all service requests, tasks, or projects that have been issued in your organization. It is a knowledge base of what has been done and of all pending IT assignments. However, to obtain the most from help desk, you should first learn how the help desk organizes workflow.

Categories, statuses and priorities are important variables in SysAid. They can help you manage your workflow efficiently, by identifying those service requests that should be queued to certain sections, while at the same time flagging those requests that require a more rapid response. In addition, routing rules can be applied to incoming service requests. This is, in fact, a way of customizing the route a service request takes upon entering the help desk. Service requests that meet all the criteria of the routing rule simply bypass dispatch and go directly to the person or group stated in the settings.

You can also create settings in help desk to monitor or track the general status of certain service requests and then to instruct help desk to perform an action when a certain amount of time has elapsed, for example send an email reminder (according to the escalation rule, which will be elaborated on soon). There is also the option to use an alert system, which applies color filled boxes into your service request lists if the service request meets certain status, priority and escalation criteria. Moreover, you can set a deadline for handling a

service request using the **Due Dates** feature, or set up timers (**Operating Times**) to monitor total response time of your help desk personnel.

Categories: In SysAid a service request has a Category and alternatively also Subcategories. The end user selects from a dropdown menu which category the service request falls into before submitting it to SysAid. For example a category can be Software, and the sub-category MS Office. When setting up the help desk, first consider what kinds of categories you want to have for your incoming service requests. These categories will serve to classify service request, and should therefore relate to your own in-house needs. A possibility is to monitor over a week the types of service requests you receive, and create a category coding list based on this information. Categories will help you to correctly queue and assign a service request to the appropriate administrator or administrator group, thus improving your workflow in SysAid. It is also possible to design different submission forms for your end users, according to the different categories you have set. To do this, however, some computer programming skills are required. Please contact SysAid Support, and our experts will be happy to assist you with creating different submission forms according to your categories. Setting up categories is described further in this chapter.

Statuses: The life cycle of a service request is presented by statuses in SysAid. A status describes the situation of a particular service request at that point in time. You should customize the statuses to reflect the stages service requests pass through until a final resolution is provided. For example **New**, **Open**, **Awaiting Response**, **In Process**, **Client Responded** and **Need More Information** are some common choices for statuses. Every service request that arrives into the SysAid Help Desk has the status **New** assigned to it. When an administrator opens a service request he can change the status to **Open**, or leave it as **New** and then queue it. You should decide your own local policy for changing statuses. Statuses are significant for calculating the time to respond for a particular service request. If the status of a service request is changed to **Open**

before the responsible administrator has read it the time to respond can appear prolonged.

Priorities: A service request can be given a priority. For example, a priority can be High or Low. Priorities can assist in accurately targeting those service requests with a higher priority to receive a more immediate response and stand idle in the queue. This configuration will make your help desk responsive and sensitive. The administrator can change the priority after having read through the contents of the service request. In addition you can set a priority rule; this is linked to a specific asset or group of assets and is set up by the administrator. Once you have set up a priority rule, a service request will automatically display this priority. Therefore, it is advised to set priorities that are workable and meaningful.


Urgency: The end users select an urgency level for their service request. As a result, the selected urgency is displayed upon opening the service request in SysAid. When creating the **Urgency** menu, each option should be carefully thought out.

Routing: In SysAid there is a **Routing** option. You can set up **routing rules** that will direct service requests as they enter SysAid to one main administrator, or route them according to set rules to different administrators and administrator groups. Consequently, when a service request is received by SysAid and routing rules have been set up, the Dispatcher will not have to manually queue these service requests. They will be automatically queued or assigned to the responsible administrator.

All of the above fields are items that assist IT department in resolving a problem in as quickly as possible. In SysAid you can choose to set up timers (**Operating Times** tab) to calculate exactly how long it takes for a service request to be open until closure, or until response.

Service Requests Enter the Help Desk

There are several routes by which service request can enter the Help Desk:

1. When an end user submits a service request via **SysAid End User Portal** he/she can select a category and sub-category that the request falls into. In addition he/she is also asked to set the urgency (Low, Normal, High, Very High, Urgent). Categories and sub categories should be set up by the administrator as soon as possible, so that the end user will be able to make a selection in the **End User Portal**.
2. Alternatively the administrator can receive a phone call requesting assistance. In this case, the administrator will open a service request in SysAid on behalf of the caller, by navigating to the **Phone Call** page, through the SysAid side bar. In this page the administrator places the request in a category and sets who it will be **Assigned to** and which **Admin Group** it belongs to.
3. The third available option is for a service request to be submitted from a customized html web page.
4. The administrator himself/herself can open a new service request by clicking on **New SR** in the side menu in the administrator interface of SysAid.
5. Finally, you can set up email integration (described later on); this allows end users, or even non-registered individuals to send an email to SysAid. SysAid will open the email as a service request.
6. Different notifications can lead to opening a service request. These notification can be configured in the Monitoring module, the Projects and Tasks module, or from the SysAid ITIL Package. The source of the service request will be then available under the control field names source. You can add this field to the list or form by using the **Customize** icon. To learn how to add a field by using the  **Customize** icon, please go to chapter 7 in this guide.

Default Pathway upon Arrival into Help Desk

A service request can enter the Help Desk and wait for dispatch to read and queue it. Alternatively, however, it can skip dispatch, if a **routing rule** is in place. In this case the service request will be automatically directed to the administrator it is assigned to. In both cases the status of the service request is **New**.

Dispatch reads the service request, and using the **Assigned to** field moves it to the appropriate person or section for follow-up. At this stage the service request may still retain its **New** status, or it can also be changed to **Open**. Your in-house policy should determine when a service request status changes from **New** to **Open**.

Ideally, the IT department would like to resolve a service request problem as quickly as possible. In SysAid you can choose to set up timers (Preferences→ Help Desk Settings→ **Operating Times** tab) to calculate exactly how long it takes for a service request to be open until closure, or until response. If you want to check response times you should have a policy on what dispatch does to the status when it queues the workload.

Categories - Setting Up Categories and Sub Categories for Service Requests

When end users fill out the submission form, they select the category the service request relates to. Upon arrival of the service request, the Help Desk dispatch can change the category if it appears that the request has been allocated to the wrong category.

A service request in SysAid has a category (for example “software” or “hardware”), sub category (such as MS Office or printers), and (if the option is enabled) a third level category. Prepare a list of categories and subcategories

that will cover the majority of the IT service requests. Here is a brief guide to setting up categories:

1. Go to **Preferences → Help Desk Settings**. Click the **Categories** tab.

At the top of the page, you will see a caption box for inputting a new category, and subcategories. To add a new category and subcategory, simply type the name in the caption box and then click **Add**. You may optionally add a brief description of what the category covers in the **Description Template**. Every time the end user will select this category the template description will appear in the service request. In case you wish a category to include more than a single sub-category, retype the name of the category in the caption box, and be careful to use the exact same spelling. You can also choose where the category will be visible: in your knowledgebase, your change and problem processes, simple incidents, and more.

2. If you wish to add a third level category, you need to enable this option in the **General Settings** page. *Note:* Go to **Help Desk Settings → General Settings** and check the tick box for **Enable third level categories**. Click the **Save** button. Now return to the **Categories** page to fill out the caption.

The categories, subcategories, and third level categories are saved in lines.

To delete a line, click the **Delete** checkbox next to it, then press the **Save** button at the bottom of the page.

Note that each line is independent on the others. Deleting one does not affect the others. In order to add several subcategories (2nd level name) within the same category (1st level name) you need to retype the category (1st level name) name once again on a new line and then the new subcategory name (2nd level name). Take care that you consistently spell category names (1st level name) the same.

You can choose whether the categories will be visible in the End User Portal, by checking their boxes under the **Visible to End User Portal** column.

You can translate the names of the categories and sub categories into different languages. They will appear in the end user portal according to the users language.

24 Choose to show the categories in the End User Portal

The screenshot shows the SysAid Service Desk settings interface. The 'Categories' tab is selected, displaying a table of categories and subcategories. The table has four columns: 'Category', 'Subcategory', 'Third level category', and 'Visible in End User Portal'. The 'Visible in End User Portal' column contains checkboxes that can be checked or unchecked to control the visibility of each category in the end user portal.

Category	Subcategory	Third level category	Visible in End User Portal
Please select an existing category or insert a new one			<input checked="" type="checkbox"/>
Application ABC	Administration	Login/Password problem	<input checked="" type="checkbox"/>
		Other	<input checked="" type="checkbox"/>
		Permission request	<input checked="" type="checkbox"/>
		Software Upgrade	<input type="checkbox"/>
	Module A	Error Message	<input checked="" type="checkbox"/>
		Other	<input checked="" type="checkbox"/>
		Error Message	<input checked="" type="checkbox"/>
	Module B	Other	<input checked="" type="checkbox"/>
		Error Message	<input checked="" type="checkbox"/>
		Other	<input checked="" type="checkbox"/>
	Module C	Error Message	<input checked="" type="checkbox"/>
		Other	<input checked="" type="checkbox"/>
	Adobe Reader	Does not work properly	<input checked="" type="checkbox"/>
		How to?	<input checked="" type="checkbox"/>
		Install/Uninstall Software	<input checked="" type="checkbox"/>
		Upgrade to newer version	<input type="checkbox"/>
	Office	Does not work properly	<input checked="" type="checkbox"/>
		Error Message	<input checked="" type="checkbox"/>
		How to?	<input checked="" type="checkbox"/>
		Install/Uninstall Software	<input checked="" type="checkbox"/>
		Upgrade to newer version	<input type="checkbox"/>
		Does not work properly	<input checked="" type="checkbox"/>
		How to?	<input checked="" type="checkbox"/>
		Install/Uninstall Software	<input checked="" type="checkbox"/>

SysAid comes with a default recommended category list to cover your day to day IT requests. You may use this list as a starting point and expand or reduce it to suite your services.

Routing

In SysAid you can route service requests as they enter the Help Desk directly to a named administrator and/or admin group. If routing rules have been set up, the Dispatcher will not have to manually queue these service requests.

The Benefits of Routing:

- Saves Dispatch reviewing and queuing service requests.
- Delivered directly to the named administrator or admin group.
- Accurate queuing to named individual or group

Usually, the routing option does not do away with the Dispatcher. Somebody will probably need to check in SysAid for "New" service requests as some may not have a category or title, while others may have been sent via email or a web page. Also, some service requests may not fall within the routing rules. The Dispatcher will have to review new service requests and assign them or queue them manually to an administrator.

To use the routing feature in SysAid, you should have set up categories, administrators and end users, as described earlier in this guide. In addition, you should decide if you want to create one or both of the following fields: **Company** (optional) and **User Groups**.

Brief Overview of Routing

To have service requests automatically routed upon entering SysAid you should make these changes in the **Routing** option.

1. To set up routing rules go to **Preferences → Help Desk Settings → Routing**.
2. Before setting up any routing rules you should have set-up:
 - **Groups (end user and administrator),**
 - **Categories**
 - If applicable **Companies**.
3. On the routing page there is a divider:

All fields located before the divider (Company, User Group, Category, and Subcategory) are what the helpdesk checks against every incoming service request. If the service request meets all the fields, it will route it to the Administrator and/or Admin group you have selected.

4. To set up who should receive the routed service requests, choose from the **Administrator** and **Admin Group** dropdown menus, which are located to the left of the divider on the routing page.

Most probably, even though routing may be set up, the administrator/s will still have to manually queue service requests not covered by the routing rule.

25 Routing page

The screenshot shows the SysAid interface with the 'Service Desk settings' tab selected. Under the 'Routing' sub-tab, there is a table for configuring request routing. The table has columns for Company, User group, Category, Administrator, and Admin and General group. The 'All' option is selected for all dropdowns, and the administrator 'bbunny' is assigned to handle all requests. There are also 'Add' and 'Delete' buttons for each row.

Company	User group	Category	Administrator	Admin and General group	
All	All	All Categories All third levels	None	None	Add
All	All	Basic Software	bbunny	none	Delete
All	All	Network Equipment	none	System Team	Delete
All	VIP users	All Categories	supervisor	none	Delete




Route All Service Requests to One Administrator

On a very simple level you can route everything to one person if you have one main administrator that will respond to all of your company's service requests, by selecting the **All** option for **Company**, **User Group**, **Category** and **Sub-Category**. Then select the administrator whom the service requests should be routed to. Finally click **Add**.

Companies - If your organization provides external IT services, you will need to set up **Companies**. Moreover, some IT administrators provide service to several independent groups. For example, different departments, or different clients who are outsourcing their IT management. To keep the inventory/help desk management separate without purchasing multiple SysAid accounts, you can

create divisions within one account by creating Companies. Also, companies should be set up if you wish to nominate an end user as a company supervisor. To learn more about this option, please go to the Supervisors section in chapter 8 of this guide.

Go to Preferences → User Management → Companies.

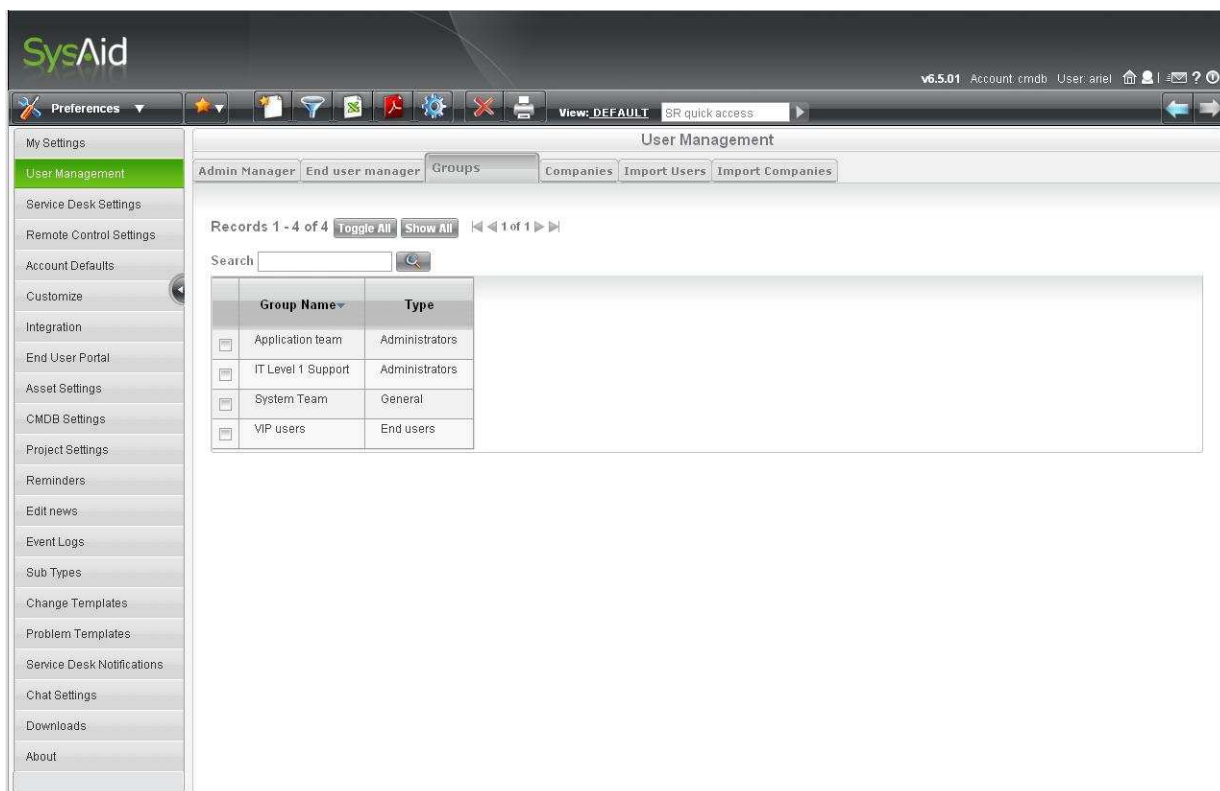
1. To create new company click on the **New**  icon, complete the company details, and then click **Ok**.
2. To now add end users to that company, go to **Preferences → User Management → End User Manager**.
3. Click on the tick box next to the users that you wish to assign to a company.
4. In the top menu bar click the button **Change company of Selected Users** . A small screen will open and using the **Company** dropdown menu, assign a company name to those users or user.
5. Click **Save**.
6. If in the **End User** page the **Company** column menu is missing, click the **Customize**  icon. In the popup screen, move "company" from the available to the visible fields, using the arrow button, and then click **Save**. Now the assigned company will be listed.

User Groups - In the help desk you can set up user groups for administrators so that you can assign certain types of service requests to a particular admin group via routing. It is also possible to group end users. For example, you can set up groups for different departments, groups for individuals who use a particular computer or software, or groups for off site offices. Then you can assign the service requests submitted by a particular end user group directly and automatically to a named administrator in help desk.

Creating User Groups

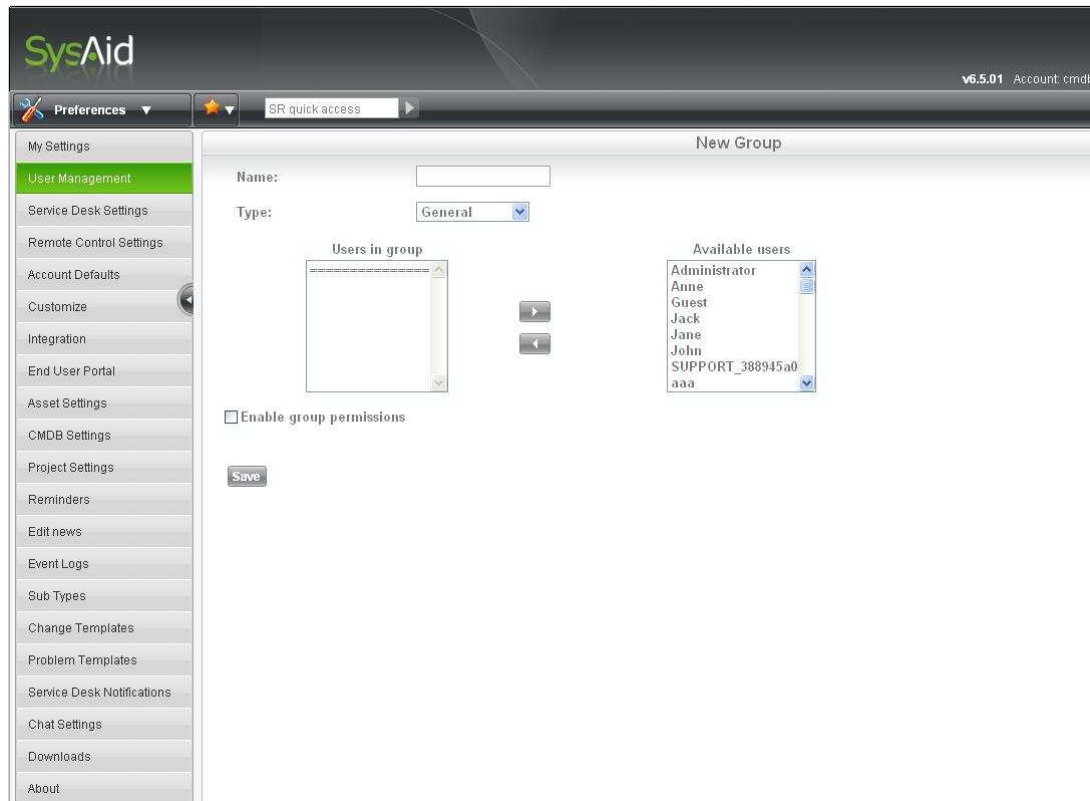
1. To set up a group in SysAid, go to **Preferences → User Management → Groups** tab. Here you can create departmental groups for administrators and end users. Here you can also divide users into logical units, then apply different rules for each group. There are three types of user groups: end user groups, administrator groups, and general groups (which include users of both types).
2. Click on **New Group** button.
3. The **New Group** screen allows you input a name for the new group, select its type, and add users from a list of available ones.
4. Select from the **Type** dropdown box the type of user. Move users into this group using the arrow tab. Create as many groups as needed.
5. You may check the **Enable Group Permissions** box if you wish to define special permissions for this group. Group permissions mean that the permissions are set for the group rather than for the user, and any user that you choose to add to this group will automatically get all the permissions you have specified for the group. Once you check the box, new checkboxes will appear, allowing you to specify the permissions for this group, according to your preferences. For instance a group called 'support' may have a certain set of permissions, and by adding users to the support group, they will automatically have the support group permissions.
6. Finally **Name** the new group you have just created and Click **Save**.

26 User Groups



Note that you can add, delete or modify a group using the upper menu buttons. You can also filter, export to CSV, print the list, or print only the groups you have selected.

27 New User Group



If you want an assigned administrator to read/write only service requests assigned to the new group, you can set this up in **Permissions** tab (**Preferences**→ click on an administrator → **Permissions** tab, choose from the dropdown menu 'View Service Requests that are assigned to user and group only'.

You can also customize SysAid to present different values in the dropdown menus of customized lists within service requests according to your different user groups. limit specific values to specific user groups. Under **Preferences**→ **Customize**→ **Customized Lists**, choose which groups will be able to see which menu items.

You can also set automatic priorities and due dates for your service request, set the alerts and the escalation rules. For further details see **Chapter 8: Managing the Helpdesk- Advanced Settings**.

Chapter 5 Inventory - Asset Management

5.1. Getting Started With Assets

Here we will review how you can manage your assets:

- ➡ Let SysAid Discover your network
- ➡ Review of your assets.
- ➡ Learn how to add, group and categorize assets.
- ➡ Remote control assets
- ➡ Connect an asset to an end user

Network Discovery:

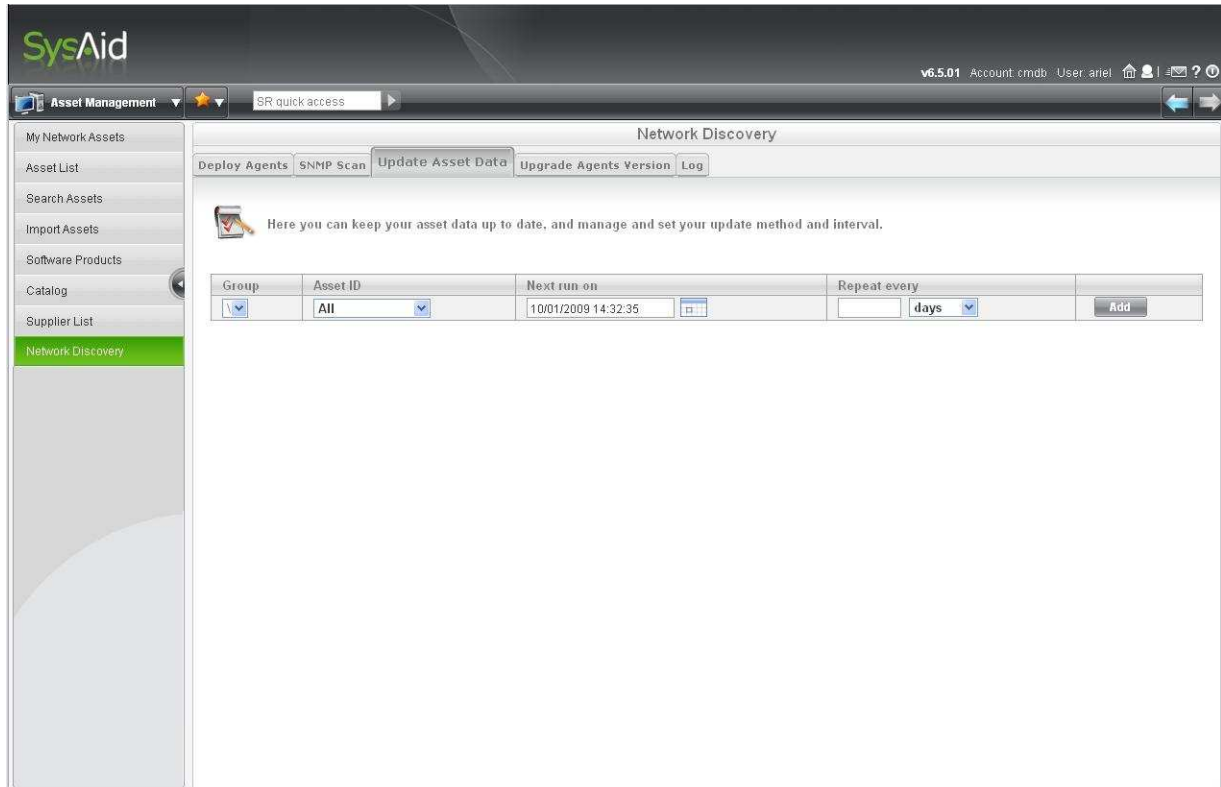
Automate SysAid to update the asset inventory at specified intervals

SysAid includes a pre-defined schedule for inventory updates and agent upgrades.

Under the **Network Discovery** tab, you can create tasks, which SysAid will perform automatically and repeatedly. SysAid keeps track of network machines, retrieving and listing their information for easy IT management. When somebody adds hardware to his or her computer, installs new software, or makes any such changes, you want to be able to see it.

1. If you want SysAid to automatically perform an update and check for new updates of an already existing asset at predetermined intervals, go to **Asset Management → Network Discovery**. Here you can program the frequency within which an asset update is performed.
 - The line for adding a new task appears on the top.
 - **Group** refers to a group of assets.
 - **Asset ID** refers to a particular asset.

28 Asset Network Discovery



2. To create a new task, choose the assets you want the task performed on. Then choose a task **Command**. The **Inventory** command scans the network for new/updates.
3. Finally, choose how often to repeat the task (**Next run on; Repeat every**).
4. If you have set up everything successfully the **Run Now** button will appear on the screen. This can be used instantly as a test. However, if you do not want to wait for the time of the next scheduled run, you can click **Run Now**. In case you do not see the **Run Now** button, this means the task you have tried to set up does not have complete information.
5. After you have clicked **Run Now**, to see all of your assets following the update click **Asset management → My Network Assets**.

Note: Automated updates of the asset inventory will not take place on newly added computers, if they do not have the SysAid agent on them.

Asset Management- Network Discovery

Under the Network Discovery, you can configure the deployment of the sysAid agent, SNMP scans, updates of the asset data and upgrading the version of your agent. You can also view the process of running network discovery tasks, and a log of historical tasks.

Asset Management→ Network Discovery→ Deploy Agents

29 Deployment of agents

Network Discovery

Deploy Agents | SNMP Scan | Update Asset Data | Upgrade Agents Version | Log

Deploy Agents to a Domain:
Here you can schedule deployment of agents to a specific domain. You may provide a list of hostnames to exclude, and define the deployment settings.

Discovery service name	Domain	Deploy Method	Run as user	Password	Exclude Host List	Schedule	Next run on	Repeat every	Agent Settings
SysAid Server		Deploy				<input checked="" type="checkbox"/>	10/05/2009 14:13:01	days	Agent Settings


Deploy Agents via IP Range:
Here you can schedule deployment of agents to defined IP ranges. You may provide a list of IP-s to exclude, and define the deployment settings.

Discovery service name	IP Range	Deploy Method	Run as user	Password	Exclude IP List	Schedule	Next run on	Repeat every	Agent Settings
SysAid Server	192.168.1.1 - 192.168.1.254	Deploy				<input checked="" type="checkbox"/>	10/05/2009 14:13:01	days	Agent Settings

Refresh remote discovery services
This will refresh the list of remote discovery services that are not scheduled above. They will be erased from the list and added only if registered again, when the remote discovery service restarts.

Here you can schedule the deployment of agents for a specific domain, or according to defined IP ranges.

Deploy Agents to a Domain

The first option is marked by this icon , and allows you to determine your preferences for a scheduled deployment to a domain. You may provide a list of hostnames to exclude from the deployment of the agents, and define the deployment settings. Use the dropdown menu to choose the name and the domain of the discovery service you wish to schedule a deployment for. The third dropdown menu helps you determine whether you wish to deploy or to remove the deployment.

If you check the **Schedule** box, you can insert or choose by clicking the calendar icon the next time to run the deployment. You may direct SysAid to repeat the deployment once every few days, weeks or months, by filling in the desired number in the pane, and choosing the correct period from the dropdown menu beneath it.

To edit the agent settings, click the **Agent Settings** button. SysAid will open a popup screen where you can make your adjustments, and determine the following details regarding your agent:

You may change the information about the server URL, the Proxy server, the hotkey, the log level and more such details. You may also upload an icon for your agent, or remove the customized icon. Determine here the refresh intervals of running the agent as a service, by inserting the number of seconds in the pane.

You may also determine the remote control settings for the agent. Check the boxes if you wish to enable remote control, if you wish the remote control to proceed only if the end user approves it, or if you wish to install a mirror driver to accelerate the performance. You may also edit in this popup screen the text of the remote control confirmation request, and the text for the **Accept/Deny** remote control buttons.

Choose whether SysAid should install a shortcut for submitting service requests in all the assets the agent is deployed on, and whether SysAid should generate a random asset ID for your network assets.

30 Agent Settings Popup Screen

Click **Save** to keep your changes of the agent settings. You may choose to save your settings as a default or return to the default, by clicking the suitable buttons.

Click the **Add** button under the **Deploy Agents** tab, to keep the scheduled deployment to a domain you have just created.

Deploy Agents according to an IP range

The second option is marked by this icon , and allows you to determine your preferences for a scheduled deployment to your specified IP ranges.

From the first dropdown menu on the left, choose the name of your discovery service. In the IP Range boxes, insert the number for the lower IP and the upper IP in your range, in the upper and lower boxes, accordingly. Use the **Deploy**

Method checkbox to choose whether to deploy or remove the deployment of the agent. If you wish to schedule a recurring deployment, check the **Schedule** box, and click the calendar icon to select a date for running the next deployment. Fill in the number of days, weeks or months you wish the deployment to be repeated, and use the dropdown menu to select the period suitable to you. You may click the **Agent Settings** button to edit the settings of the agent, as described above (regarding the deployment to a domain). Click the **Add** button under the **Deploy Agents** tab, to keep the scheduled deployment to an IP range you have just created.

SysAid SNMP- Simple Network Management Protocol

SysAid Asset management module uses the SNMP protocol to discover and manage all your network devices such as: printers, routers, switches etc. You can also find out about changes in these devices and monitor various data that the device makes available, such as toner level for printers and so on.

31 SNMP Scan Table

Discovery service name	IP Range	SNMP Version	Community String	Community Password	Exclude IP List	Schedule	Next run on	Repeat every
DEFAULT	192.168.1.0 - 192.168.1.255	SNMP V1	public			<input checked="" type="checkbox"/>	03/23/2009 16:18:17 	<input type="text"/> days

SNMP scan settings:

To determine the settings for your SNMP discovery service, go to:

Asset Management → **Network Discovery** → **SNMP Scan** tab.

The SysAid SNMP scan identifies new devices in your network. SysAid identifies the ID of the device according to the mac address of the first interface of the device.

Here you can determine which service will perform the scanning of your network for new devices. The default service is the SysAid Server, but you can also add other remote discovery services, by choosing from the **Discovery Service Name** dropdown menu.

To learn more about adding remote discovery service name see **Preferences → Downloads**.

The **IP Range** column presents the default range for scanning, which is the subnet that your SysAid Server resides in. You can set it to a different range, according to your needs.

You can also choose the SNMP version you wish to use. Note that version V3 requires a password.

The Community String is a code that allows the communication, and by default in most devices it is public. You can change the Community string to be different than public, to match the community strings on your devices.

You can use the Exclude IP List column to specify which devices should not be included in the scan range entered.

Under the Schedule column you can decide whether the scan will be automatically preformed in certain intervals according to your preferences, or you wish to manually perform the scan yourself by clicking the **Run Now** button. You have a possibility to refresh the list of remote discovery services that are not scheduled, by clicking the button on the bottom of the page. These will be erased from the list and added only when the Remote discover tool registers again.

Under the **Asset Management → Network Discovery → Log** tab, you can view the history of your network scanning, and the progress of currently running scans. To see more details about each scan, click the row entry of that scan in the table.

Keeping your assets updated:

To make sure assets that were discovered by SysAid SNMP Discovery service are periodically updated, you can set regular updates under **Asset Management**→**Network Discovery**→**Update Asset Data** tab, as described earlier in this Guide, in Chapter 5.1: **Automate SysAid to update the asset inventory at specified intervals**.

Customize the information extracted from your network devices:

You can create a list of custom OID-s that will be retrieved from your devices and mapped into different asset fields.

OID-s (Object Identifiers) are special codes each vendor manages to allow communicate via the SNMP protocol, a common language between your server and the network device. You can edit your OID-s list under **Preferences**→**Asset Settings**→**Customized SNMP OID-s** tab.

Here you can find a table with a list of common OID keys used by manufacturers of network devices. You can manually add new keys and descriptions for new network devices here, if you choose. It is recommended to add a clear display name for the device you wish to list. If you add more information, for instance, where is the device located and who is responsible for it, you will be able to see this information in SysAid, too.

The Mapped Field column helps you determine where the information will be presented in the asset page in SysAid. You can choose the appropriate field from the dropdown menu.

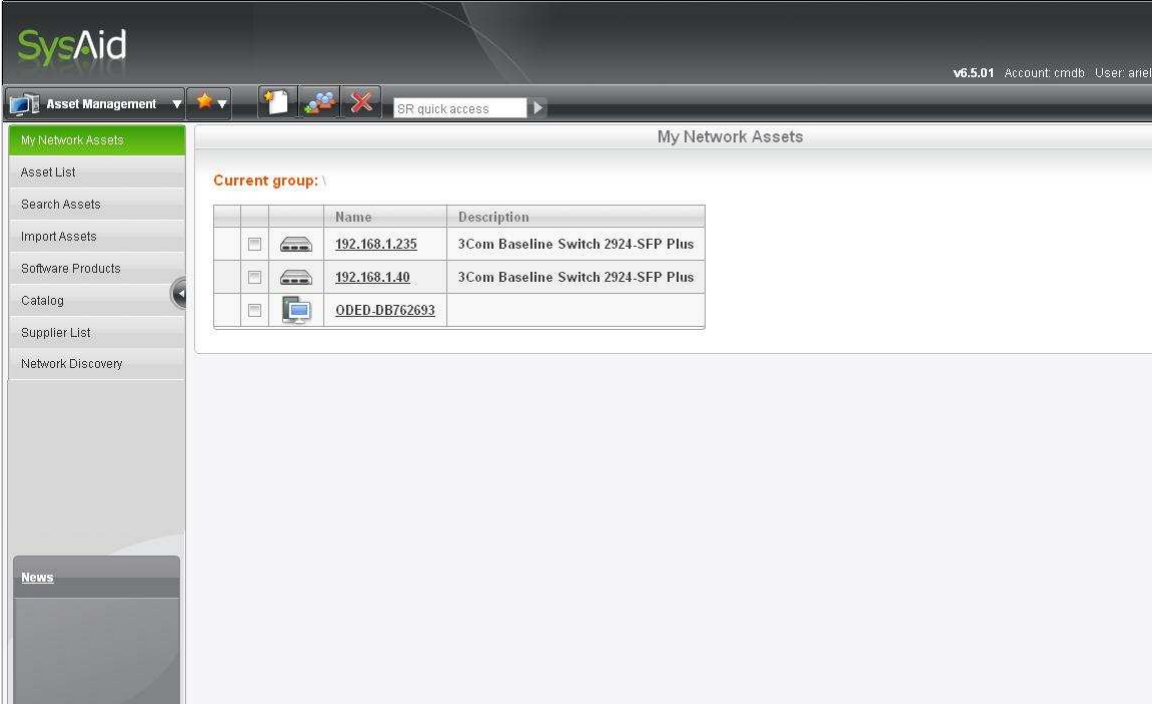
An example for a customized OID you might want to add is the Toner Level of your printer. Find in the documentation of your printer the OID that holds this value, and add it to the customized OID list. Map this OID to a custom field and change its name. You can do so, under **Preferences**→**Customize**→**Translate**. To learn more about adding your own customized fields, please read Chapter 7 in this guide, under: **Benefits of the Translate Option - Customizing the Menu Options and Headings**

Reviewing Assets




To access the **Asset Management** module, click on **Asset management** from the sidebar menu. If you click on **My Network Assets** or **Asset List**, generally these pages list all of your assets. Right now, however, these pages will not contain anything as you have just completed installation and need to start the process of adding you assets.

If your server is installed on Windows operating system and you have a new installation of release 6.0 and above, the server itself should appear as your first asset. Your server will appear in your Asset List automatically, a few minutes following the initial installation.

My Network Assets





The screenshot shows the SysAid web interface. The top navigation bar includes the SysAid logo, version v6.5.01, and user information. The left sidebar contains a menu with options like Asset Management, My Network Assets, Asset List, Search Assets, Import Assets, Software Products, Catalog, Supplier List, and Network Discovery. The main content area is titled 'My Network Assets' and shows a table of assets under the heading 'Current group: \'.


	Name	Description
	192.168.1.235	3Com Baseline Switch 2924-SFP Plus
	192.168.1.40	3Com Baseline Switch 2924-SFP Plus
	ODEO-DB762693	

Adding Assets - various options

There are four ways in which you can add the assets of your company to the inventory:

1. Automatically add assets - adds all computers that operate with Windows and Linux. First you need to deploy the SysAid agent -as described in section 5.2 below.
2. Automatically detect network devices using an SNMP scan. See section 5.2 in this guide for further details regarding this option.
3. To add an asset manually, go to the main menu, click **Asset management** → **Add Assets**. There you will see the link to [please add it manually](#). You can also use the icon  **Create New Asset**, from the Asset List for the same purpose.
3. Alternatively you can click **System** → **Asset List** and double click on the new  icon; this will allow you to a **Create Standalone Asset**. Once you have completed all of the fields in the **Information** page, click **Ok** to save.
4. Finally, assets can also be imported from a comma delimited file (.csv), in the menu click **Asset management** → **Import Assets**, **Browse** for a file or files to import. The advantage of this method is that if you have a large number of assets to be added manually you can specify the details in an excel file and import them into SysAid in one simple step. The Excel file should not include any column headings and should be saved in .csv format. Note that this option is available for importing users and companies as well, under **Preferences** → **User Management**

Import a .csv file from Excel

1. To import a .csv file from Excel, first prepare the Excel file. To give you an idea of the fields used in SysAid, go to **Asset management** → **Import Assets**. Under the column heading **Field Content**, click on the dropdown menu. Here you will see all the field names. Build your Excel file based on those fields.
2. Save your Excel file as a .csv file. Go to **Asset management** → **Import Assets**. Click on the **Browse** button. Select the file name.
3. In the **Number of Fields**, enter the column headings or number of fields you have in the Excel file (maximum 32). It is advisable not to add or subtract from this number in the Number of Fields box whilst you are in the middle of selecting **Field Content**, since this will delete the already completed row entries.
4. The **Format box** only needs to be completed if you have a date field. You can use either European (dd/mm/yyyy) or US date formats (mm/dd/yyyy).
5. Finally click the **Submit** button. To confirm that the file was imported successfully, go to **My Network Assets** and click on each of the assets, and check the information.
6. It is worthwhile to create specific icons for imported assets, otherwise the default icon given by SysAid to imported assets is:  which indicates a communication problem between SysAid server and the asset. See the **Icons** section below for further instructions.

When importing an asset from a csv file, SysAid can import also the company and the group the asset belongs to. The name of the group and the name of the company will be created in case this information was not registered before.

Asset List

Another way to view the assets of your organization is via the Asset List (**Asset management**→ **Asset List**).

More information on how to customize lists and manage them can be found in Chapter 7.

32 Asset List

SysAid v6.5.01 Account: cmdb User: ariel

Asset Management View: DEFAULT SR quick access

My Network Assets
Asset List
 Search Assets
 Import Assets
 Software Products
 Catalog
 Supplier List
 Network Discovery



Asset List - Records 1 - 3 of 3 **Toggle All** **Show All** << 1 of 1 >> Licensed assets Unlimited

Search

Group: All Owner: All Type: All

Name	Group	Location	Description	IP Address	Type	Manufacturer	Serial	Purchase Date
ODED-DB762693	\			192.168.1.77	Workstation	VMware, Inc.	VMware-56 4d 4f 03 d8 4e a0 91-99 d6 0a 59 ef 84 4a bd	
192.168.1.235	\		3Com Baseline Switch 2924-SFP Plus	192.168.1.235	Switch		yosi	
192.168.1.40	\		3Com Baseline Switch 2924-SFP Plus	192.168.1.40	Switch			

News

By clicking on one of the assets the **Information** page will open. This page contains an overview of that asset. You can easily navigate to any of the additional six pages that detail the attributes of that asset: **Maintenance**, **Help Desk**, **Hardware**, **Software**, **Activity Log**, and **Remote Control**. In each page you can review, add and update information on that particular asset. From each of these pages you can add or remove fields by clicking on the  **Customize** icon or print out the contents of the asset by clicking on  **Print** icon. Further details of how to manage this list are provided in Chapter 7.

To review those service requests that relate to a specified asset, first select the asset from the **Asset List**, and then click on the **Help Desk** tab; in this screen you will see the **Service Request List** for that asset.

Asset Monitoring Tab

When looking at the details of a specific asset, you can check the **Monitoring** tab. Under this tab it is possible to view any monitoring information defined on this asset and check the status of its monitoring configurations and monitoring graphs.

33 A Service Request submitted relating to a specific asset

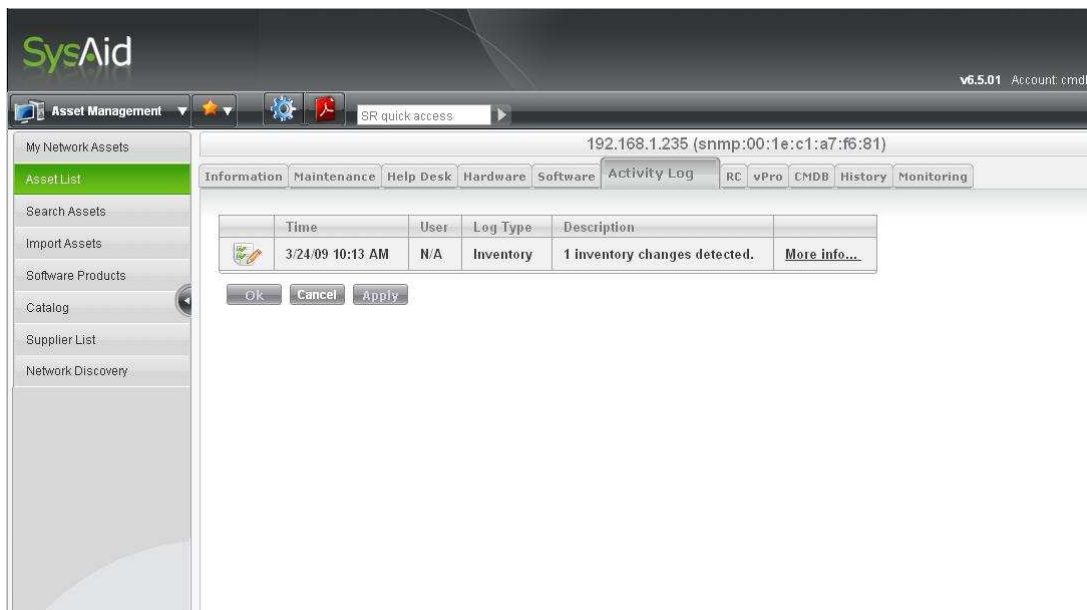
The screenshot shows the SysAid web interface. The top navigation bar includes 'System', 'Settings', 'SR quick access', and user information. The left sidebar lists various asset management functions. The main area is titled 'DEV001 (00-18-8B-26-10-20)' and contains tabs for 'Information', 'Maintenance', 'Help Desk', 'Hardware', 'Software', 'Activity Log', 'RC', 'vPro', and 'CMDB'. The 'Help Desk' tab is active, displaying a table of records. The table has columns for record number, modification time, status, category, title, request user, company, assigned to, and modifier. The first record is a 'newsletter' example SR assigned to 'ariel'.

#	Modify Time	Status	Category	Title	Request User	Company	Assigned to	Modify User
189481	11/24/08 10:19 AM	New	newsletter	Example SR	ariel	ilient Team	rel	rel
189443	11/23/08 9:42 PM	New	Sales	Re: SysAid Price List	portuguese Wagener		david@ilient.com	rmwmentor@gmail.com
189450	11/24/08 12:23 AM	New	Sales	RE: SysAid Price List			sean	tony@tgalindo.net
189461	11/24/08 5:21 AM	New	Sales	RE: Receipt of payment	Anil	LOGON International	none	anil@logon-int.com
189462	11/24/08 6:18 AM	New	Sales	Re: SysAid Price List	Shah		david@ilient.com	manoj@omzest.com
189464	11/24/08 6:52 AM	New	Sales	RE: Second Notice - Your			none	Andrew.CUMMING@northpow
189479	11/24/08 10:15 AM	New	Sales	Your software Antivirus			none	awards@vista-files.org
189449	11/24/08 12:19 AM	New	Support Request	Re: Barry, just a quick	Watts	Q-COMP	none	Barry.Watts@qcomp.com.au
189447	11/23/08 11:31 PM	New	Support Request	Sale Offer- ViagraCialis			none	almeta.takisha_hl@5000years
189448	11/24/08 12:07 AM	New	Support Request	Installing sysaid with	McCarthy		none	jeremy.mccarthy@forestrytas.c

The Hardware and Software pages provide you with exact listing of what the computer contains.

If you have deployed the SysAid agent, each time your software or hardware changes, these changes are automatically recorded in the **Activity Log**. If you click on [More info...](#), the specific inventory changes will be displayed, with the date and time. If a service request is sent from a user whose computer is listed as belonging to that user, then all service requests sent from that asset will also be listed in the **Activity Log**.



34 Activity Log



Finally the **Remote Control** page details the last time remote control access was performed and the host name of a particular computer. Setting up remote control is detailed below.

Setting up Asset Folders

Now that all of your assets are listed in **My Network Assets**, you should plan how you would like to organize your assets. For example, you can decide on the number of groups needed. Plan the name of the groups and what type of assets should be included.

1. To create a group of assets go to the **My Network Assets** page. To select assets for the new group click on the small box ☐ located to the left of the asset icon.
2. In the top menu bar, click on the **New Group**  icon.
3. Click the **Move to Group**  button on the top menu bar. A popup box will open, prompting you for a name for this group. Type the name of the group and click **OK**.
4. In **My Network Assets** the new group you created will appear with an icon. Click on the name of the group to see all assets which are assigned to that group.


Browsing Hierarchies and Assets

To browse a hierarchy and to see the contents of any asset group, click on its name. The page detailing the information for that asset will open.

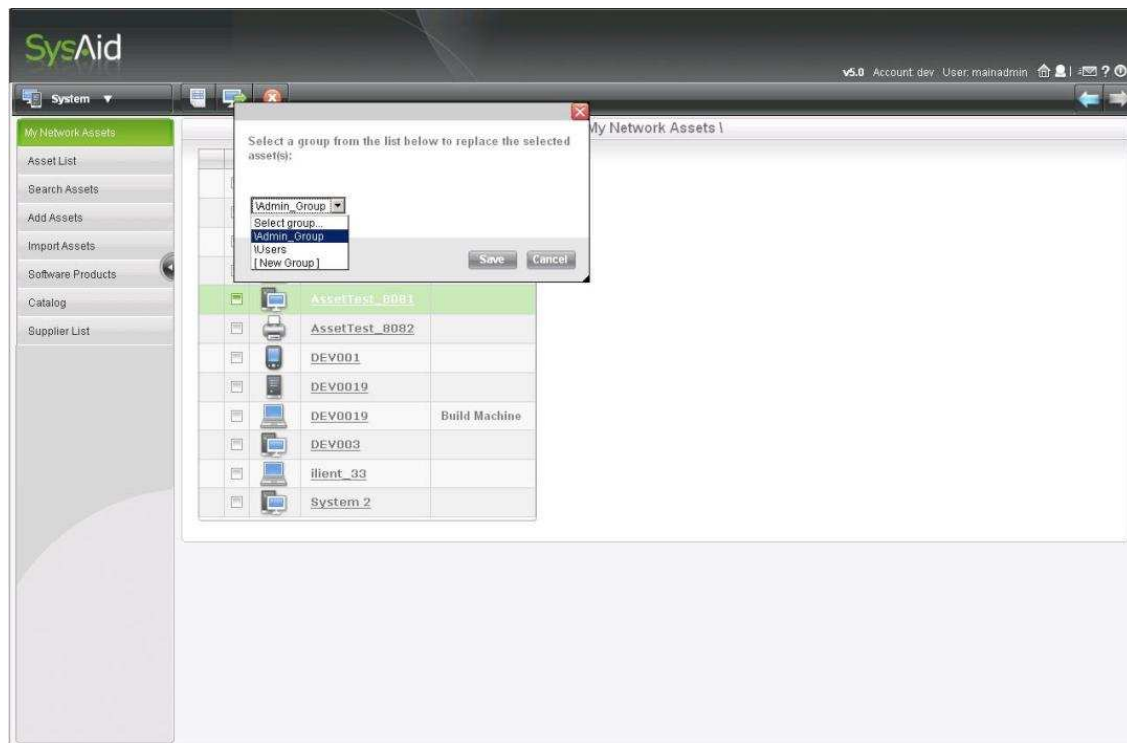
To drill down to see the contents of an asset group, click on the group asset name and its contents will appear. To return to the parent group click → **Up** link.

Move an asset or group of assets into a different group

If you notice that an asset appears in the wrong group, you can easily move it.

1. In the **My Network Assets** screen, browse to the appropriate level of the hierarchy, where the asset or group is displayed with a check box. Click on the check box for all those assets or groups that you would like to move, simultaneously.
2. At the top of the **My Network Assets** page, click on the **Move to Group** button , a dropdown menu will open; chose the group that the assets you selected will be moved to.
3. Click **Save**. The assets will have been moved.

35 Move an Asset to a New Group



Icons

Select and Upload Asset Icons and Add a New Caption

You are free to add new asset icon images for asset groups or for individual assets. You can also add new caption text to the icon.

1. In the sidebar click **Preferences** → **Asset Settings** → **Assets Types** tab
2. In the **Asset Types** tab, you can choose icons associated with asset types, or even define new asset types. These types are displayed in the **Asset List** (Figure 25).
3. If you have your own icons you can upload them and add them, too. Click on the **Upload Icon** button, or click on the **Change Icon** button next to the asset of your choice. When the new popup screen opens **Browse** for the file containing the icons. To finish click **Upload**. Then click the **Add** button.
4. To add new caption text to the icon, click on the **Change Caption** button. A popup box will appear. Enter the new text, and then click **OK**.

You can set up in the **Asset Types** tab the icon to appear next to imported assets, so that you will easily identify them. In the **Type** caption box create a name that will appear next to your imported assets in the **My Network Assets/**. Upload the icon. Click **Add**.

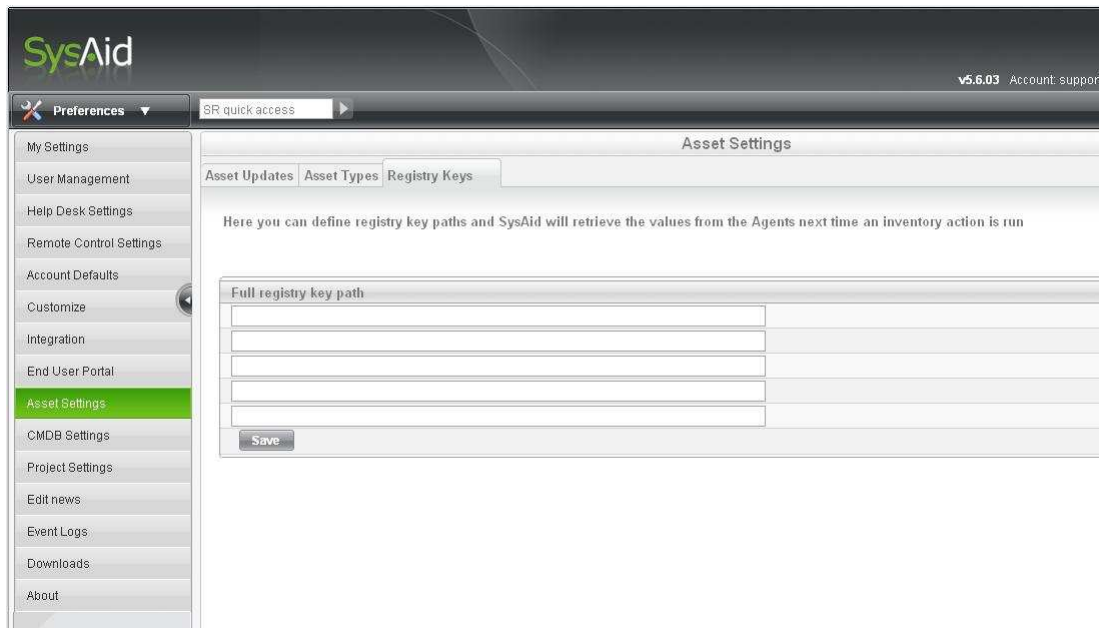
Make sure that one of the fields in your **Excel** table is called **Import**. Do not forget to define this field as "**Type**" in the **Field Content** on the **Import Assets** screen. After import, to change the caption next to the icon, follow step 4 above.

Registry Key Values

Under **Preferences** → **Asset Settings** you can find the registry key values tab.

The SysAid agent can collect customized registry key values. They are added to your asset information. For example, you may want to collect the file definition or the date of the last update of your anti-virus program - you can find this information in the registry, usually under your antivirus software section.

36 Registry Key Values Tab



Remote Control Settings

With SysAid, administrators can remote control many assets. An administrator can access a remote asset from his/her own computer, controlling it from afar. This enables administrators to fix end users' problems without leaving their offices. If you elect for all computers to be remote controlled, leave the default settings as they are.

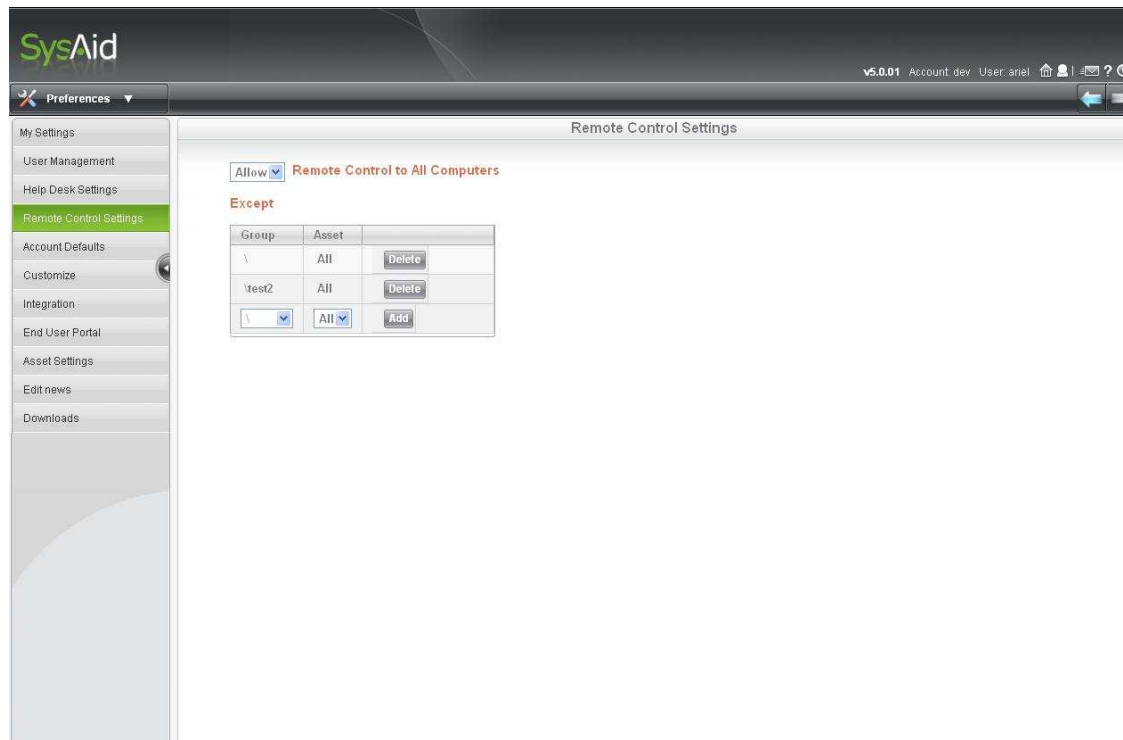
Deny Remote Control Access to All Assets

1. To deny remote control access to assets, in SysAid's sidebar click **Preferences → RC Settings** (Figure 31).
2. This page is where you specify a default rule - whether to **Allow** or **Deny** remote control (click on the drop down menu).

Allow - permits and authorizes remote control access to all assets.

Deny - Prevents/prohibits remote control access to all assets.

37 Remote Control Settings



- At the top of the **Remote Control Settings** page, make sure that **Deny** appears in the dropdown box. Ensure that there are **no row entries** in the **Except** table. This setting will deny remote control access to all assets.

Allow Remote Control Access to All Assets

To allow remote control access to all assets, verify that **Allow** appears in the dropdown box at the top of the **Remote Control Settings** page. Make sure that there are no row entries in the **Except** table. This will allow remote control access to all assets.

Other Options No. 1 - How to set up the following access rule: To allow remote control access to the majority of assets, at the same time excluding a few assets from remote control.

1. For this rule select the **Allow** tab in the dropdown menu.
2. In the Table, titled **Except** specify those assets you want to exclude from remote control.
3. If the asset is in a group, select the name of the group; go to the first column and move to the row where you can see the dropdown menu. Select the group the asset belongs to.
4. Only move to the asset column, and select the asset itself if you **do not want to exclude an entire asset group**.
5. Now move to the last column and click the **Add** button.

The rule is simple; use the **Allow** or **Deny** setting in the drop down menu to specify the rule for the majority of the assets. For exceptions to the rule (the rule is set in the **Allow** or **Deny** drop down box) enter these exception in the table called **Except**.

Option 2 - Setting up a rule - Deny access to all assets except for a few assets.

1. For this rule select the **Deny** tab in the dropdown menu.
2. In the Table titled **Except** specify those assets you want to allow remote control access to.
3. If the asset is in a group, select the group; go to the first column, and move to the row where you can see the dropdown menu.
Select the group the asset belongs to.

4. Now move to the next column, and select the **Asset** that is to be excluded from the dropdown menu itself. Each asset will appear in a different row.
5. Move to the last column and click the **Add** button.
6. Assets can easily be removed from the **Except** table by clicking the **Delete** tab on the appropriate row.

Exercising Remote Control over another computer

In order to exercise remote control over another computer, you need to first:

- Allow remote control over that distant computer (see previous section).
- Permit the administrator to activate remote control. To learn how to do that, please consult the section **Administrator's Permissions** in Chapter three of this guide.
- Install the **Administrator Tools** in your network. To learn more about the installation of these tools please consult *Guide 4:*

Administrator Tools Installation Guide,

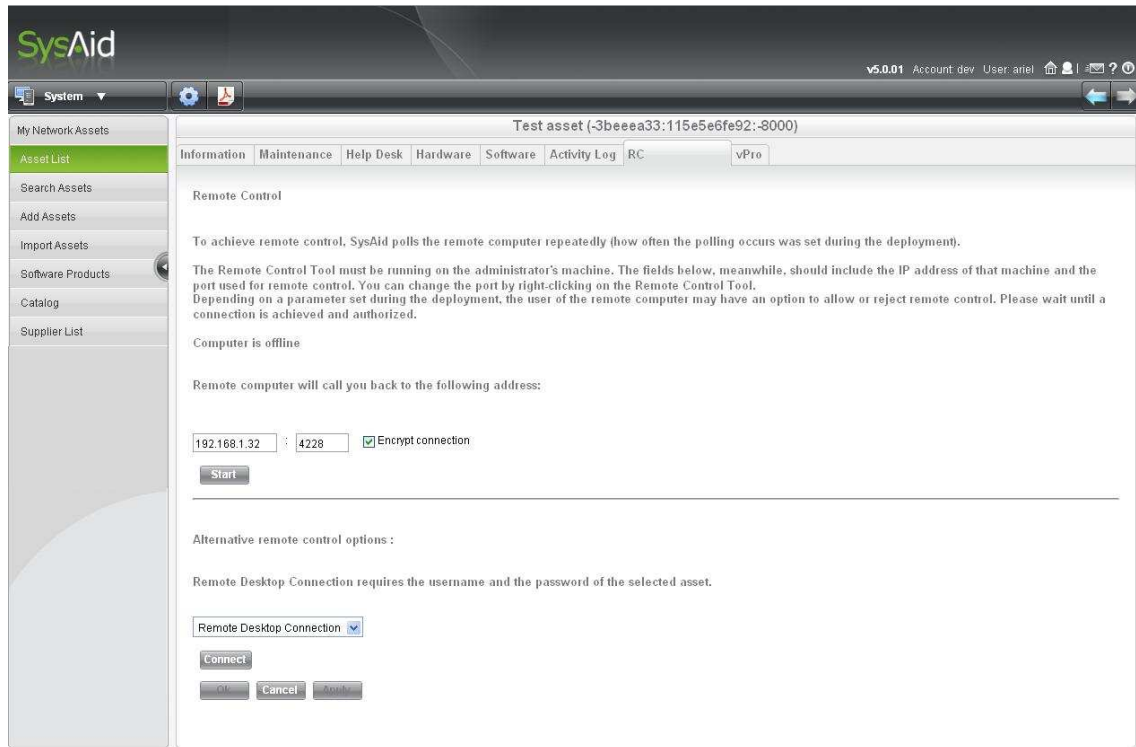
http://www.ilient.com/download/administrator_tools.PDF


Once you have taken care to fulfill the conditions specified above, you can move on to activate the remote control from your own computer as follows:


1. Go to **Asset management** → **Asset List** → choose the computer you wish to remote control.

2. Go to the Remote Control (RC) tab. You will be able to see the IP and the port your computer is listening on.

38 Remote Control tab



3. Since you have installed the Administrator Tools, you will be able to see a small icon of an eye at the right bottom corner of your screen, on the lower horizontal bar. Notice the background of the eye icon is green.  This is an indication that your computer is not being remote controlled by another computer on your network. Similar icon exists in all the computers on your network.
4. If you wish to exercise a remote control over another computer with an encrypted communication, please check the box **Encrypt communication** which appears on the RC page.
5. You should also make sure that the port you are listening on enables encrypted communication. To verify that, stand with your

mouse on the eye icon  on the lower horizontal bar of your screen. You will be able to see the number of the port which enables encrypted communication. If this is not the same port as the one specified in the RC page, change your current listening port to the port which appears in the eye icon.

6. In case you have defined in the deployment process that the end user whose computer you wish to remote control should permit your access, in this stage a box asking for permission to exercise remote control will appear on the screen of the computer you have asked to control. Only when the end user will allow you access to his/her computer, will you be able to remote control it.
7. Even if you did not define in the deployment process that a permission form the end user is required, once you remote control a distant computer, the end user will be able to see his/her computer is being remote controlled, since the background color of the eye icon in the controlled computer will change into blue:



Enabling Remote Control with Alternative Programs

In case the SysAid remote control tool does not coordinate with your own system, you may use one of the following alternative remote control tools with SysAid:

- Remote Desktop Connection
- Ultra VNC Viewer

To be able to use one of these alternative remote control tools with SysAid you need to:

1. Purchase one of these alternative tools separately, as they are not a part of SysAid.
2. In the left bottom of corner of your computer go to: **Start → Control Panel → Asset management → Click the Remote tab.**

3. Check the box: 'Allow Remote Assistance invitations to be sent from this computer'.
4. Go to Ultra VNC website at: <http://www.uvnc.com/download>
5. On the administrator side, install the VNC viewer.
6. On the client side, install the VNC server.
7. Once you connect to Remote Control, click Open. Insert the username and password of the remote-controlled computer, and click Remember to insure you will not be asked to give the username and password again the next time you remote control this computer.

Intel vPro Support

vPro is a chip by Intel that provides support for software and hardware inventory management. The vPro chip allows remote access to your network, even to machines that are turned off.

If you have vPro chip installed on your network assets, you can use SysAid to control your network even when you are not in the office.

1. In the SysAid administrator portal go to Asset management → Asset List.
2. Click on an asset from your list that has the vPro chip installed.
3. A new page will open, with the details of that asset. Go to the vPro tab, which is the last tab in the asset page.
4. Click **OK** or **Apply** to allow control over the asset via SysAid.

To learn more about Intel vPro go to:

<http://www.intel.com/business/vpro/>

Connecting an Asset to an End User

IT administrators have a hectic schedule; with SysAid they can potentially receive hundreds of service Requests per day. If you have SysAid Help Desk and Asset Management you can make this task easier. One of the ways SysAid can be helpful is by linking the end users' computer (asset) to the user him/herself, or

to a group of users, for example a shared printer. This greatly assists administrators. When a service request is opened, the administrator immediately views the asset it refers to. Even if the user submits the request via the SysAid interface yet from another computer, the administrator will still see the asset that user is linked to. The administrator can easily see the history of the asset, or how many times problems are reoccurring on a particular computer.

You can link an asset either to one end user, or to a group of end users. This is set up in the **Information** page of the appropriate asset.



1. Go to **Asset management** → **My Network Assets**.
2. Click the asset you wish to link to a user.
3. In the **Information** page, select the appropriate user/users in the **User** field
4. Click **Save**.

Deleting an asset or a group of assets

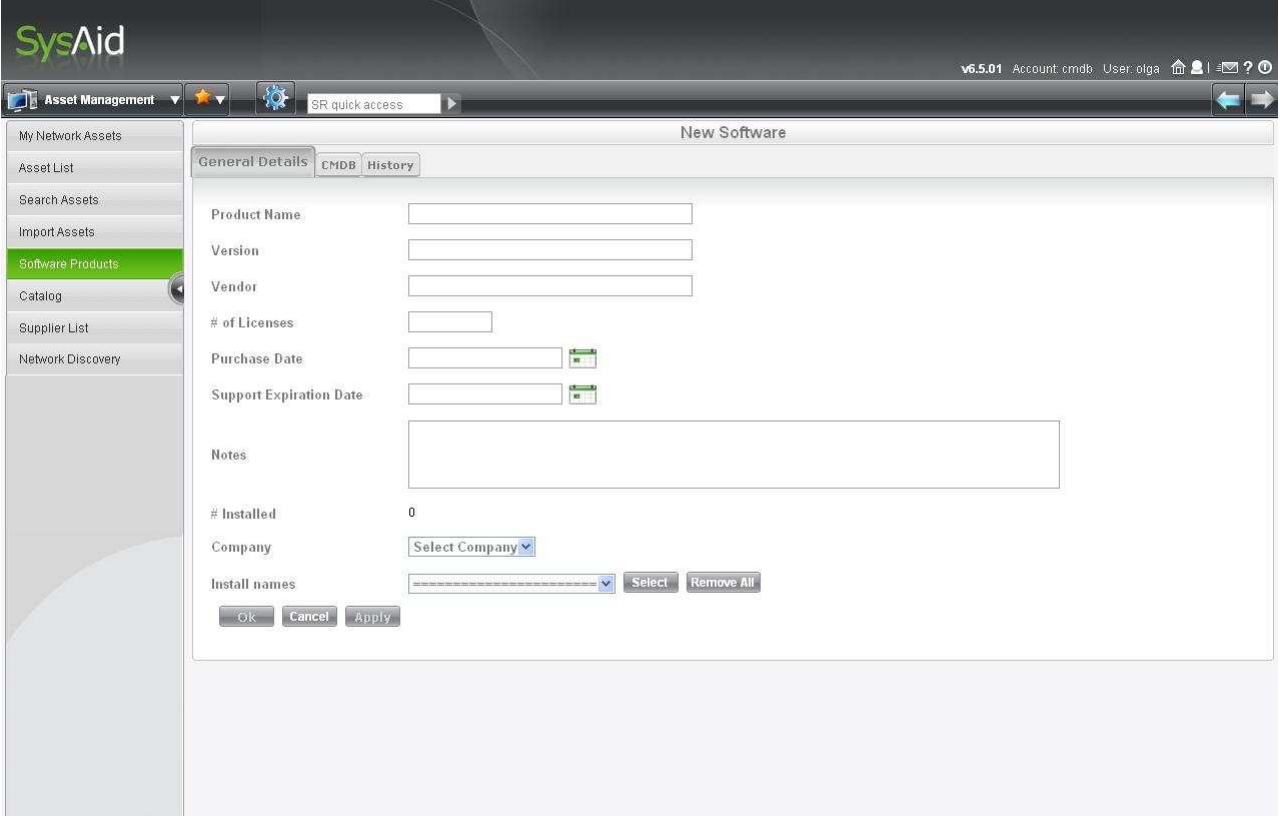
To delete an asset click **My Network Assets**; select an asset or a group of assets by clicking on the check box, or browse within the hierarchy where the asset or group is displayed. Click the **Delete** button at the top of the page. When you delete a group, all its assets will also be deleted.

Software Products

If you click the Software Product link in the SysAid sidebar menu, you will navigate to the **Software Products** page. To begin with, this page will be empty, of course. You need to feed the information about your software

products. Click on the **New**  icon. This will lead you to a form in which you can specify various details about a software product used by the computers of your net. The fields in the form are: the name of the product, the company it belongs to, the vendor of the product, the number of the license for the product, the purchase date and the support expiration date for the product. You can also add notes about the specific software product you are adding. Fields can be added or removed by using the Customize Form  icon on the top of the page. To learn more about how to use this icon, please go to **Chapter 7** of this guide.

39 New Software Page



The screenshot displays the SysAid web interface for adding a new software product. The left sidebar shows the navigation menu with 'Software Products' highlighted. The main content area is titled 'New Software' and contains a form with the following fields and controls:

- Product Name:** Text input field.
- Version:** Text input field.
- Vendor:** Text input field.
- # of Licenses:** Text input field.
- Purchase Date:** Date picker.
- Support Expiration Date:** Date picker.
- Notes:** Large text area.
- # Installed:** Displayed as 0.
- Company:** Dropdown menu with 'Select Company'.
- Install names:** Dropdown menu with 'Select' and 'Remove All' buttons.
- Buttons:** OK, Cancel, and Apply at the bottom.



In a box at the bottom of this page you can see the **Available Install Names** of the software products in your organization, as detected by the SysAid agent.

Please select from the list those software products that are used on your computers, and add them to the **Install Names** box. For Instance, there might be listed Windows 97, Windows 2000, and Windows XP in the **Available Install Names**. Your network computers, however, might employ only Windows XP. In this case you need to add into the **Install Names** box only the Windows XP software product. You can direct SysAid to show only non-used install names, which allows you to view clearly which install names do not have a software product assigned to yet.

Under **Asset Management** → a specific asset → **Software Products** tab, you can see a table displaying the software products that are installed on this asset according to your pre-defined lists of software products.



Catalog Items

The catalog list is the grouping of specific assets according to the type of catalog item they belong to. For example, in the case you have several DELL Latitude D830 model laptops. The catalog item will be Dell D830, and it will be automatically detected by the SysAid Agent.

To reach the **Catalog** page, click the **Catalog** link in the SysAid sidebar menu. To begin with, this page, too will be empty. You need to feed the information of your catalog items. To add a new catalog item to your list, click on the **New**  icon. This will lead you to a form called **New Catalog Item**, in which you can specify various details about a catalog item used for the computers of your net. The fields on this form are: the catalog number, the name of the item, the model of the item, the manufacturer and the supplier of the item. You can also add notes regarding the item you are adding to the catalog list. Fields can be added or removed by using the **Customize Form**  icon on the top of the page. To learn more about how to use this icon, please go to Chapter 7 of this guide. Once you have completed the form, click **Save**.

Supplier List

The **Supplier List** page contains information about all the suppliers of the hardware, software and catalog items of your network. You need to feed the information about the suppliers yourself. You can reach this page by clicking on **Asset management** → **Supplier List** on the sidebar menu.

To add a new supplier to your list, click on the **New**  icon. This will lead you to a form called **New Supplier**, in which you can specify the following details about that supplier: the supplier's name, the supplier's address, phone number, fax number, and the email address of that supplier. You can also add notes to this form, if needed. Fields can be added or removed by using the **Customize Form**  icon on the top of the page. To learn more about how to use this icon, please go to Chapter 7 of this guide. Once you have completed filling out the **New Supplier** form, click **Save**.

SysAid SNMP- Simple Network Management Protocol

SysAid Asset management module uses the SNMP protocol to discover and manage all your network devices such as: printers, routers, switches etc. You can also find out about changes in these devices and monitor various data that the device makes available, such as toner level for printers and so on.

40 SNMP Scan Table

Discovery service name	IP Range	SNMP Version	Community String	Community Password	Exclude IP List	Schedule	Next run on	Repeat every
DEFAULT	192.168.1.0 - 192.168.1.255	SNMP V1	public			<input checked="" type="checkbox"/>	03/23/2009 16:18:17	days

SNMP scan settings:

To determine the settings for your SNMP discovery service, go to:

Asset Management → **Network Discovery** → **SNMP Scan** tab.

The SysAid SNMP scan identifies new devices in your network. SysAid identifies the ID of the device according to the mac address of the first interface of the device.

Here you can determine which service will perform the scanning of your network for new devices. The default service is the SysAid Server, but you can also add other remote discovery services, by choosing from the **Discovery Service Name** dropdown menu.

To learn more about adding remote discovery service name see **Preferences → Downloads**.

The **IP Range** column presents the default range for scanning, which is the subnet that your SysAid Server resides in. You can set it to a different range, according to your needs.

You can also choose the SNMP version you wish to use. Note that version V3 requires a password.

The Community String is a code that allows the communication, and by default in most devices it is public. You can change the Community string to be different than public, to match the community strings on your devices.

You can use the Exclude IP List column to specify which devices should not be included in the scan range entered.

Under the Schedule column you can decide whether the scan will be automatically performed in certain intervals according to your preferences, or you wish to manually perform the scan yourself by clicking the **Run Now** button.

Under the **Asset Management → Network Discovery → Log** tab, you can view the history of your network scanning, and the progress of currently running scans. To see more details about each scan, click the row entry of that scan in the table.

Keeping your assets updated:

To make sure assets that were discovered by SysAid SNMP Discovery service are periodically updated, you can set regular updates under **Asset Management**→**Network Discovery**→**Update Asset Data** tab, as described earlier in this Guide, in Chapter 5.1: **Automate SysAid to update the asset inventory at specified intervals.**

Customize the information extracted from your network devices:

You can create a list of custom OID-s that will be retrieved from your devices and mapped into different asset fields.

OID-s (Object Identifiers) are special codes each vendor manages to allow communicate via the SNMP protocol, a common language between your server and the network device. You can edit your OID-s list under **Preferences**→**Asset Settings**→**Customized SNMP OID-s** tab.


Here you can find a table with a list of common OID keys used by manufacturers of network devices. You can manually add new keys and descriptions for new network devices here, if you choose. It is recommended to add a clear display name for the device you wish to list. If you add more information, for instance, where is the device located and who is responsible for it, you will be able to see this information in SysAid, too.

The Mapped Field column helps you determine where the information will be presented in the asset page in SysAid. You can choose the appropriate field from the dropdown menu.

An example for a customized OID you might want to add is the Toner Level of your printer. Find in the documentation of your printer the OID that holds this value, and add it to the customized OID list. Map this OID to a custom field and change its name. You can do so, under **Preferences**→**Customize**→**Translate**. To learn more about adding your own customized fields, please read Chapter 7 in this guide, under: **Benefits of the Translate Option - Customizing the Menu Options and Headings**

Troubleshooting

Check to see if the 'General' icon  appears in **My Network Assets**

Now review the **My Network Assets** page, carefully check to see if the 'General' icon  appears next to an asset entry. If you see this icon it signals a communication problem between the asset and the SysAid Server. Consult the **Troubleshooting Section** in our **End User Portal**, or in our website for further details (<http://www.ilent.com/troubleshooting.htm>). You can also contact the Ilient support team (support@ileint.com).

Verify that All Assets are Present

If you are not sure that all of the assets in your organization have been identified by SysAid, in **My Network Assets**, click on **Search Assets** in the side bar menu and perform a search. In the text box, either type the exact name of the asset in inverted commas (" "), or perform a general text search. In the **All Fields** dropdown menu specify the asset type.

If you suspect that an asset is missing consult our **Troubleshooting Section** for further details (<http://www.ilent.com/troubleshooting.htm>) or contact the SysAid support team.

If you have purchased the asset management/inventory module you will need to deploy the SysAid agent. Instructions for deploying the agent are provided below.

5.2. Deploying the SysAid Agent

Option 1 - Automatically add your assets

The recommended way to add your assets automatically is using the SysAid agent.

The SysAid Agent

The agent is a *tool*. It compiles the inventory, reports on the clients' machine on network, and has additional associated tools that assist the Help Desk, for example the **Hot Key** or **Screen Shots**. The agent is part of what compiles the inventory.

Advantages of the Deploying the SysAid Agent for Help Desk

End users can enjoy the following advantages:

- By pressing the **HotKey** the SysAid end user portal is instantly opened
- Add screenshots to service requests of the reported problem
- Remote Control facility
- An option to define your own customized icon which will be deployed to your workstations
- You have an option to have the Agent require the end user to login. This is a useful option for shared workstations which have a generic login, when end users want to submit SRs with screenshots and asset details.

Described below are a number of deployment options you can choose from.

Default Agent Settings

By choosing to install the Administrative Tools or by performing Manual

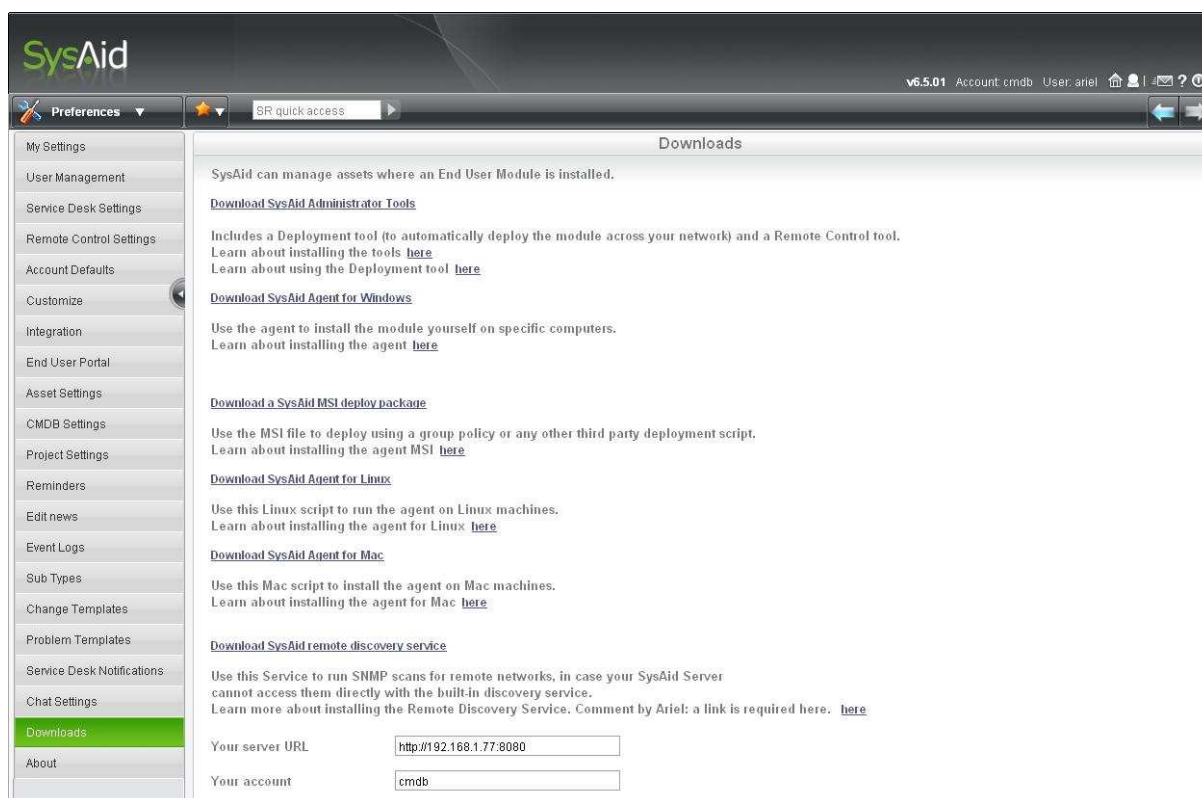
Installation of the SysAid agent you will be provided with default settings agent configuration.

Deploying the SysAid Agent

All computers that are connected to the network need a copy of the SysAid agent, otherwise SysAid will not be aware of them.

The **Downloads** page allows you to install **Administrator Tools** (a part of the administrative tools is the deployment tool), thereby automating deployment across your network. Alternatively, there is the option to deploy the **SysAid Agent for Windows** the **SysAid Agent for Linux**, or the **SysAid Agent for Mac** either using a login script or performing manual deployment. You can also choose to download a SysAid MSI deployment package from this page. All account information necessary for installing SysAid agent (Account, URL Serial key for account) can be found in the **Downloads** page as well.

41 Downloads Page



To access this page, in the main menu, click on **Preferences → Downloads**.

Table 1: Downloads Page Items Listing the Three Deployment Options

Item	Description
SysAid Administrator Tools	Click this link to commence installation of the SysAid Admin Tools with a Setup Wizard. (Applicable for Windows NT-up to 3.6 SysAid version, Windows 2000, and Windows XP computers). As a result of an installation of the Administrator Tools, you will have access to the Deployment Tool and to the Administrative Remote Control Tool. If this installation fails or is not applicable, e.g. your network has firewalls or anti-virus, continue to try the other options below, or please consult our online Troubleshooting Guide http://www.ilient.com/troubleshooting.htm
SysAid Agent for Windows	Click this link to perform automatic deployment with a login script for Windows. Manual Installation can also be performed with this option, and provides default agent settings.
SysAid Agent for Linux	

Download a SysAid MSI deploy package

SysAid Agent for Mac

Click this link to perform automatic deployment with a script for Linux. Manual Installation can also be performed with this option.

For instructions please go to:
<http://ilient.com/msi.htm>

For instructions please go to:
http://ilient.com/mac_agent.htm

Three Options- Deployment Instructions:

Option 1 SysAid Administrator Tools: Automatic deployment with the deployment tool (Windows NT- up to 3.6 SysAid edition, Windows 2000, and Windows XP computers):

1. Click **SysAid Administrator Tools**. Save the file to your hard disk.
2. Run **Deploy SysAid**.
3. Click on Under Microsoft Windows Network. Make certain that you see all of your network computers.
4. In the **Action** menu you should choose the appropriate option (for example **Deploy to selected computers**); make sure you select computers this action applies to.
5. If you do not see your computers listed contact the SysAid support team.
6. Finally to uninstall, select computers and click on the **Uninstall from selected computers** button.

For more detailed instructions, please read Guide 4: Administrator Tools Installation Guide, http://www.ilient.com/download/administrator_tools.PDF followed by Guide 5: The Deployment Tool Guide, <http://www.ilient.com/download/deployment.PDF>. Both documents are also available at <http://www.ilient.com/>.

You should proceed either to automatic deployment with a login script, or to manual deployment if you did not choose **SysAid Administrator Tools**.

Option 2 (a) - Automatic deployment with a login script

Microsoft Windows

1. Click **SysAid Agent for Windows**. Save the file, named *SysAidAgent.exe*, to a location that is shared on the network by all computers. If you do not, verify that you put it in several places to cover all computer locations.
2. For Windows add the following lines to the network login script, overwriting the tags with the appropriate values. It is not recommended to cut and paste the text, as **tags < > are not permitted in the login script**. Ensure that there is a space before every backslash "/" in the login script.

```
<Path to SysAidAgent.exe>\SysAidAgent.exe /VERYSILENT /URL <server URL>
/account <account id> /serial <serial number> /install once /AllowRegister <Y or N>
/AllowRemoteControl <Y or N> /SubmitSRShortcut <caption of the submit service
request shortcut> /HotKey 122 /Interval /ConfirmRC <Y or N> /RandomMachineID
N /AllowSubmitSR <Y or N >
```

Table 2: Description of the parameters in the login script

Parameter	Description
URL	URL of the server SysAid is running on.
account	The account ID

Parameter	Description
serial	Your SysAid serial number located on the bottom of the Downloads page on your local SysAid Server.
install once	This option will only install the SysAid agent if it was not installed before. If SysAid was already installed it will not overwrite. Therefore you should delete install once if you are now upgrading or redeploying SysAid.
AllowRegister	Permitted values are Y or N
AllowRemoteControl	The permitted values are Y or N.
SubmitSRShortcut	This is the name your organization gives the caption of the submit service request shortcut, if greater than one word enclose it in " "
HotKey	The hotkey number. Once SysAid is deployed across your network, users will be able to launch the system by clicking a hotkey, for example F11. Yet, login script does not understand F11, but rather identifies a location of a key within the keyboard from the registry, and assigns it according to its numeric placement (e.g. F11 has a value of 122). Please do not set F12 as your hotkey with Windows NT4 and Windows 2000/XP, since in these the F12 is reserved for use by the debugger.
Interval	The agent poll interval, in seconds. To monitor computers, SysAid will occasionally scan them, viewing their details and updating the information it displays. By default, SysAid will run as a service on computers, contacting the server every given number of seconds.
ConfirmRC	The permitted values are Y or N. Optionally, when an administrator attempts to remote control a computer, the user of that computer must confirm the remote control.
RandomMachineID	Generate random machine ID. The permitted values are Y or N. Generally the default will be N.
AllowSubmitSR	To have a shortcut to SysAid placed on your desktop and to activate the hotkey insert Y. Alternatively, choose N, not to have a shortcut to SysAid and to deactivate the hotkey.

URL, account and serial elements are mandatory. The explanation here provides a clear definition of the parameters, the valid options, and example of successful login script.

Example with completed values:

```
z: \sysaidagent.exe /VERYSILENT /URL http: //10.0.0.10:8080 /account SMITH /serial
3333333 /install once /AllowRegister N /AllowRemoteControl Y /SubmitSRShortcut
SysAid /HotKey 122 /Interval 30 /ConfirmRC N /RandomMachineID N
/AllowSubmitSR N
```

Option 2 (b) Automatic deployment with a script: *SysAid Agent for Linux*

1. On the **Downloads** page click **SysAid Agent for Linux**, and save the file which is named SysaidAgent.exe, to a location that is shared on the network.
2. Add your own script. Alternatively, we can provide you with a compressed TAR file, and then you can open and run the script in your computer scheduler.

Please proceed to read the **manual installation** instructions if the aforementioned options have failed, or you simply prefer to opt for manual installation.

Option 3 Manual Installation for Windows and Linux (Default agent configuration)

1. Click **SysAid Agent for Windows** or **SysAid Agent for Linux**.
2. Save the file, named SysAidAgent.exe, onto your hard disk.
3. Execute the file from each computer in the network, follow the instructions, and complete the installation. Each computer that logs on to the network will automatically execute SysAidAgent.exe and install the SysAid end user module. From that moment on, SysAid will monitor the computer. Some assets, such as printers, can only be added manually.

4. This option deploys the agent with default settings.

Uninstalling the SysAid Agent

In the event you want to uninstall the SysAid agent, you should choose one of the options below depending upon how the SysAid agent was originally deployed:

- SysAid Administrator Tools - to uninstall the SysAid agent, you can use the deployment tool to un deploy the client from every computer. Click on: **Deploy SysAid → Action → Undeploy from selected computers.**
- Manual installation - Go to **Start → Control Panel → Add/Remove Programs.**
- Login Script - "C:\Program Files\SysAid\unins000.exe" /verysilent

To uninstall the SysAid server go to **Start → Control Panel → Add/Remove Programs.**

To verify that SysAid has been removed check to see if you have SysAid server directory on your computer. If you can still see the directory, simply delete the directory.

If you plan to reinstall the SysAid server at a later date, save the contents stored within the built-in database; if you will not do so, you will lose all of the contents of the database.

Related Guides and Reading

Guide 3: Getting Started Guide

http://www.ilient.com/download/getting_started.PDF

Guide 4: Administrator Tools

http://www.ilient.com/down/administrator_tools.PDF

Guide 5: The Deployment Tool

<http://www.ilient.com/down/deployment.PDF>

Guide 6: The SysAid Agent

<http://www.ilient.com/down/agent.PDF>

Chapter 6 Monitoring Module

Monitoring is an extremely useful IT management tool, that enables you not only to address problems and malfunctions that have already occurred and have been reported on these via service requests, but to be notified about possible failures in your network and thus proactively prevent these in advance. Also, the SysAid Monitoring module will allow you to exercise better control over your network, and keep your assets from unwanted software and hardware. Thus, the monitoring tool can save you a great deal of time, costs and extra work.

The SysAid monitoring tool ensures utmost functionality of all your network components, from your most vital network applications, your servers, and down to each individual workstation on your network.

The monitoring tool is divided into two main sections: servers monitoring and workstations monitoring.

A server is a computer that delivers information and software to other computers on your network, while a workstation is a client computer connected to your network.

Working with our new SysAid Monitoring tool will raise your IT practice to a whole new level. You will be amazed by how many complications can simply be avoided in advance!

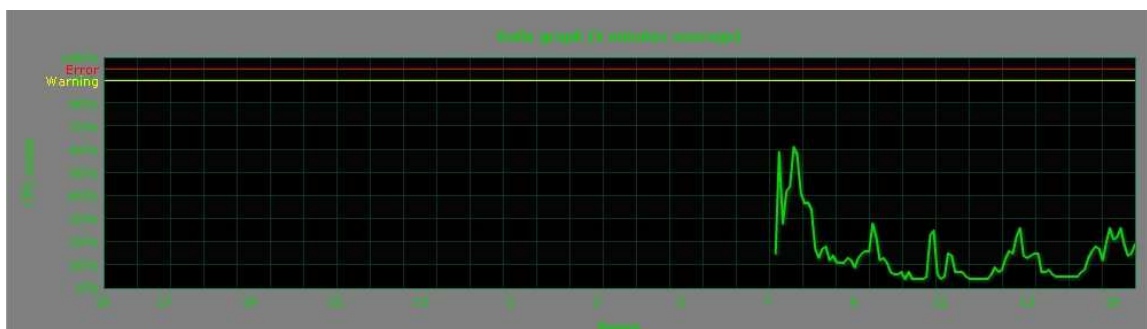
You can configure the necessary checks that will be preformed on each asset or on a group of assets yourself. You can also create special templates composed of different series of checks that can then be assigned to the relevant assets.

SysAid takes a proactive approach and allows you to define customized notifications on monitoring warning signals and alerts by sending customized emails or text notifications, and even allows you to automatically open Service requests. Constant tests for memory usage, hard disk usage, vital OS services and processes, network services, software and hardware updates and more. You

can see a visual representation of all the monitoring tests on daily, weekly, monthly and yearly graphs.

Part of the monitoring module is included in the core product, while additional functionalities are available only in the Full SysAid Edition.

42 Monitoring Graph



Please see the SysAid Monitoring Guide for full details on this module :
<http://www.ilient.com/down/monitoring.pdf>

Related Guides and Reading

Chapter 4 - Introduction to help desk

Guide 9 - The Database:

<http://helpdesk.ilient.com/CustomPage.jsp?pageName=download.html&fileName=TheDatabase.pdf&EndUserLink>

Chapter 7 Advanced Configurations

In this chapter we cover those advanced configurations throughout SysAid modules: **Help Desk**, **Asset Management** and **Tasks/Projects**. The second half of the chapter contains a mini-guide for administrators who want to learn the standard features.

7.1 Tools for Customization in SysAid

7.1.1 Translate

SysAid administrators can adapt and modify the interface of SysAid using the **Translate** feature in order to comply with the internal settings of a company, for example language, syntax, style and layout.

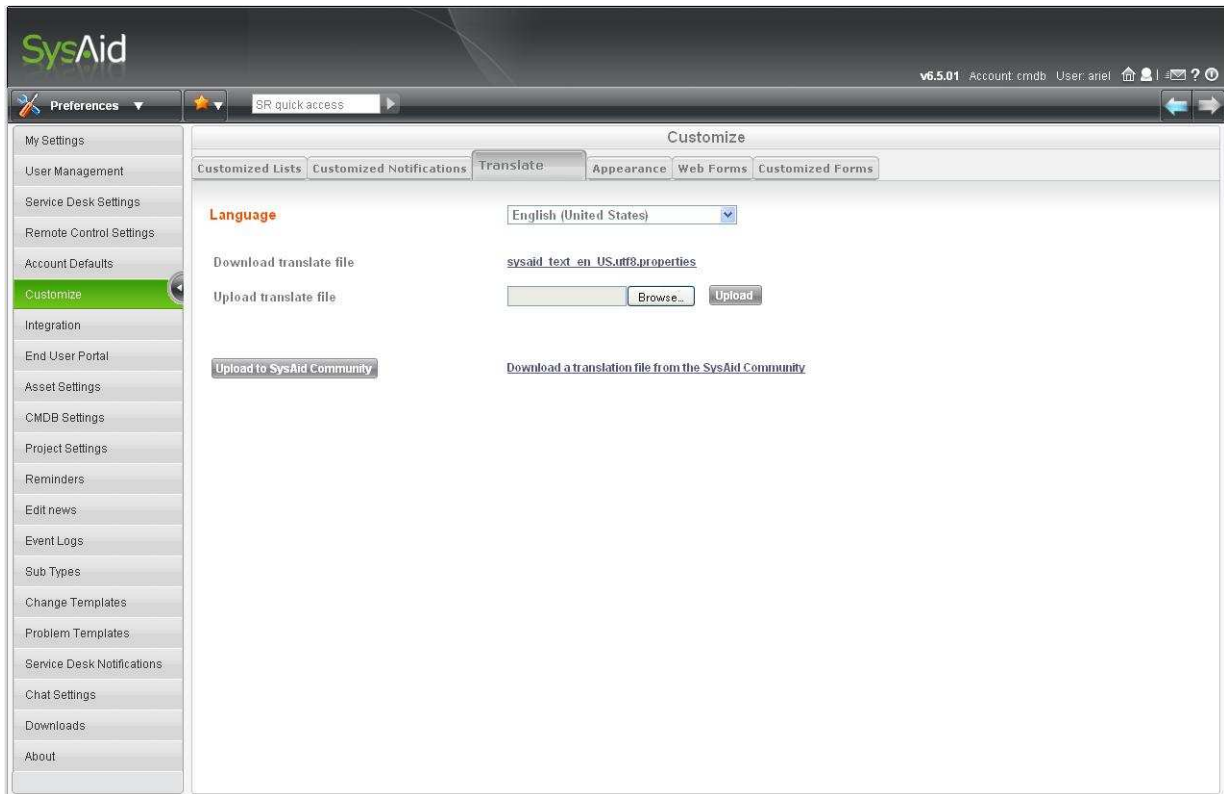
Multilingual Option in SysAid -Translate

Languages Ready to Use

SysAid offers the administrator the opportunity to select the following languages for immediate set up: *English, Dutch, French, German, Hebrew, Italian, Spanish and Russian.*

1. To set a language, go to **Preferences → Customize → Translate**.
2. In **Locale**, select the language your company would like to use.
3. In order for the translate setting to take effect, you also need to set your **Locale** on the **My Settings** page under **Preferences**.
4. You should set that language as a default locale for new users under **Account Defaults**.

43 Translate page



Overview of How to Make Your Own Translations

It is possible to translate SysAid interface to your own language, for the benefits of both administrators and end users.

1. For languages other than *English, Dutch, French, German, Hebrew, Italian* and *Spanish* SysAid can be easily customized. The administrator will need to select in **Locale and Language** Settings the new language, in **My Settings** (for him/herself), and in **Default Settings** (for the users). You can also look for translations to your local language in the SysAid Community, or help others by sharing the translation you have made there. Go to **Admin Portal** → **Community** → **Resources** → **Translations**, or simply follow the link below:

<http://ilient.com/Sysforums/forums/list.page?listType=translations>

2. The administrator should perform a one time translation of key terms.
Download the text file in the **Translate** page.
3. Save the file to your own computer. For that purpose should use a text editor program such as Notepad.
4. Translate the texts, save the file, and then upload it, again, from the **Translate** page in SysAid.

Benefits of the Translate Option - Customizing the Menu Options and Headings

1. This option provides you with the flexibility to change one or more words used throughout SysAid. For example, you may be using the English locale, and want 'service requests' to be called 'trouble tickets'.
2. To make this change go to the **Translate** page, and choose the **English** locale. Download the text file to your computer, edit it in a text-editor: locate the words 'service requests' and change them to 'trouble tickets'. Save your change. Upload the text file from the **Translate** page. Now, wherever the words 'service requests' had appeared in SysAid, you will see the words 'trouble tickets' instead.

Modifying Menu Names

Bolder changes can be made; for instance, the titles of the menu options located on the sidebar in SysAid can be also modified. For example, you can rename **Tasks/Projects** to something more specific or relevant to your IT team, such as 'Software Installation'.

1. To change any of the menu headings on the menu sidebar go to **Preferences → Customize → Translate**. Download the text file, save it to your computer and open it with a text editor such as Notepad.
2. To find in the text file the menu option you wish to rename, you should search for the string 'leftmenu.'. For example, the **Task/Project** menu option will be found in the caption box next to the string 'leftmenu.project'.
3. The following interactive menu items located horizontally on the top menu of SysAid can also be renamed: **SysAid, Account, Time, Home, Message, Help, and Logout**. In the **Translate** page they are all preceded by the string 'topmenu.' followed by the name of the menu item itself. To change the menu name, to the right of the equals sign (=) type the new menu name,
4. Save the changes you have made in the text file.
5. In the SysAid **Translate** page, upload the file you have just edited. The changes will take effect immediately.

Obviously, you may also want to translate SysAid into a language it does not support. Choose the appropriate locale and translate each word on the **Translate** page. If you are ready to share your translation with other SysAiders who speak your language, please contact Ilient support support@sysaid.com.

7.1.2 Customize Icon

In SysAid you will encounter two types of pages: A **form** and a **list** page.

Form - A form page contains a summary of information on a specific service request or any other SysAid entity (such as catalog item, supplier, user, etc.)

List - If you select **Help Desk**, **Tasks/Projects** and **Asset management** → **Asset List** from the main sidebar menu in SysAid, you will be taken to a list page. (There are also lists of many other SysAid entities such as catalog items, suppliers, users, etc.) Here you are provided with a table listing of the contents of service requests, projects and your assets. By clicking on a row entry you can navigate to a specific service request, project or asset, which is a form page.


Both the form and the list page can be customized in SysAid by clicking on the




Customize icon.

Customize the Form

Redesigning Forms

This option is available in the full edition only. To learn more about SysAid Full edition, please follow this link: <http://ilient.com/fullversion.htm> . SysAid is extremely flexible; it will let you redesign its forms. You can add, remove, and change the location of the fields. Wherever you see the **Customize icon**:  this indicates that the current form may be redesigned. New fields may be added, including new customized fields, and in the Help Desk portal even a new page can be added to SysAid.


Customize the Form

1. To add additional fields to a form, for example to the **Mobile** form- where you can submit service requests received via a mobile phone- (**Help Desk → Mobile**) click on the customize icon . The **Design Form** popup opens.

44 Design Form




1. In the **Available Fields** select fields to appear in the **Mobile** page. Using the arrow button move the fields to the **Visible Fields** box. Click **Save**.
2. It is possible to add your own customized text fields, or a dropdown menu field or an integer field. All fields that start with the word "custom" in the **Available Fields** list can be customized by the administrator in the **Translate** page. To do so go to **Preferences → Customize → Translate**, and download the text file in order to edit it. The following fields detailed in the table below can be edited by typing in the text file the new name on the right of the equals sign (=). These fields can be customized for any of the Help Desk screens.
3. Scroll down the page and click the **Save** button.

4. Return to the **Mobile** page, and click on the **Customize**  icon.
Repeat step 2 (above).

Create a New Form Tab in the Help Desk Interface using the **Customize** icon

Choose the particular fields you would like to appear on your new tab and a name for the new tab.

1. To create the page, go to any of the pages of a service request in the help desk interface, for example **General Details**. Click on the **Customize**  icon. The **Design Form** popup screen opens.
2. In the **Design Form** click the **New Tab** button, on the bottom of the screen. In the **Tab** caption, type the new name of the new tab you wish to create.
3. From the **Visible Fields** box add or remove fields to display on the new tab using the arrow buttons.

Note that you can choose that the field will be of a view-only type, by ticking the checkbox **View Only** in the **Customize** popup screen. This will prevent users from editing the field.

45 View Only checkbox in the Customize form popup screen

4. Click **Save**.
5. Your new tab will now be available for viewing.

Adding Your Own Customized Lists

All items contained in the dropdown **List** field in the **Customized Lists** page (**Preferences** → **Customize** → **Customized Lists**) can be formatted into a dropdown menu. There are two options in SysAid:


1. Make a dropdown menu from the fields already available in **Customized Lists** or
2. Set up dropdown menus based on new customized field names by editing Custom List 1 and Custom List 2 in the **Translate** page.

Set up the dropdown menu field.

1. If you want to create a new dropdown menu name entirely, first go to **Preferences → Customize → Translate**.
2. To add a new list name, download the text file and save it to your desktop.
3. In the text file, look for the fields: `cust_list1` or `cust_list2`. Each of these fields is preceded by letters that indicate which interface they pertain to (see table 3 for the complete listing).
4. Replace the name of the list, which appears on the right of the equals sign (=) with the name of your new dropdown menu.
5. Scroll down to the end of the page and click **Save**.
6. Upload the file from the **Translate** page.

To create a new menu field:

1. Go to **Preferences → Customize → Customized Lists**.
2. In the **List** dropdown box select the name of your new menu.
3. Note: When editing **Status** Items in **Customized Lists**, each item in the **Status** menu must be of class "Open", "Closed", or "Deleted/Ignore". When you modify/create status items, you will be asked to associate each one with a class. SysAid handles requests based on this status class. For example, if you add the status "Solved" of class "Closed", then every time you change a service request to "Solved", SysAid will update the close time. SysAid reports (described later in this manual) will consider the request to be closed.
4. In the **Key** box, you should use a numeric figure. Add the text description in the caption box. Click **Add** to save this line entry.
5. You can adopt any numerical coding sequence (1, 2, 3, 4, 5 or 10, 11, 12, 13, 14); the only rule is that you cannot use the same number twice as this causes the entry to be overwritten. Do not punctuate numbers, do not use commas ",", or full stops ".".

6. Once you have added all entries to the menu, click **Save**.
7. Finally go to the page where you want to add the dropdown menu field. Click on the  **Customize** icon.
8. A pop screen will open, called **Design Form** or **Customize List**. In the box called **Available Fields** you will now see the newly named menu field. Select it. Click on the arrow button to move it to the **Visible Fields** box.
9. Click **Save**. This new dropdown menu will now be updated and appear in the page you selected.

Customize the Form and the List Page

Add New Fields to Customize Fields

SysAid provides the option of customizing extra fields for different SysAid entities. You can define the following custom fields:

- Two text fields named Custom Text 1 and 2
- A long text field named Custom Notes (such as the Notes field for service requests)
- Two dropdown menus named Custom List 1 and 2 (such as the Status/Urgency/Priority menus), the values of which appear in the Customized Lists page under Preferences
- Two (integer) numeric fields named Custom Int. 1 and 2

You can change the caption of these custom fields in the **Translate** page (**Preferences → Customize → Translate**). The names of the fields are self-explanatory.

You can choose that certain fields will be visible in the form under each tab, by moving them from the available to the visible fields in the customizing popup


screen, while you are under a specific tab and you click the  **Customize** icon.

Table 3: Fields that can be customized in the Translate page

Field name in the translate page	Field Type	For use
asset.cust_list1	Creates a drop-down menu (text or numeric)	In the asset interface only
asset.cust_list2	Creates a drop-down menu (text or numeric)	In the asset interface only
asset.cust_text1	Adds text field only	In the asset interface only
asset.cust_text2	Adds text field only	In the asset interface only
asset.custom_notes	Adds a note box	In the asset interface only
asset.cust_int1	Adds a numeric field only	In the asset interface only
asset.cust_int2	Adds a numeric field only	In the asset interface only
companycust_list1	Creates a drop-down menu (text or numeric)	In the help desk interface (for company categories)
companycust_list2	Creates a drop-down menu (text or numeric)	In the help desk interface
companycust_text1	Adds text field only	In the help desk interface
companycust_text2	Adds text field only	In the help desk interface
companycust_notes	Adds a note box	In the help desk interface
companycust_int1	Adds a numeric field only	In the help desk interface
companycust_int2	Adds a numeric field only	In the help desk interface
sr.cust_list1	Creates a drop-down menu (text or numeric)	In the help desk interface
sr.cust_list2	Creates a drop-down menu (text or numeric)	In the help desk interface
sr.cust_text1	Adds text field only	In the help desk interface
sr.cust_text2	Adds text field only	In the help desk interface
sr.cust_notes	Adds a note box	In the help desk interface
sr.custom_int1	Adds a numeric field only	In the help desk interface
sr.custom_int2	Adds a numeric field only	In the help desk interface
project.cust_list1	Creates a drop-down menu (text or numeric)	In the project interface
project.cust_list2	(Creates a drop-down menu (text or numeric)	In the project interface
project.cust_text1	Adds text field only	In the project interface
project.cust_text2	Adds text field only	In the project interface

Field name in the translate page	Field Type	For use
project.cust_notes	Adds a note box	In the project interface
project.cust_int1	Adds a numeric field only	In the project interface
project.cust_int2	Adds a numeric field only	In the project interface
task.cust_list1	Creates a drop-down menu (text or numeric)	In the task interface
task.cust_list2	Creates a drop-down menu (text or numeric)	In the task interface
task.cust_text1	Adds text field only	In the task interface
task.cust_text2	Adds text field only	In the task interface
task.cust_notes	Adds a note box	In the task interface
task.cust_int1	Adds a numeric field only	In the task interface
task.cust_int2	Adds a numeric field only	In the task interface
user.cust_list1	Creates a drop-down menu (text or numeric)	In the user management interface
user.cust_list2	Creates a drop-down menu (text or numeric)	In the user management interface
user.cust_text1	Adds text field only	In the user management interface
user.cust_text2	Adds text field only	In the user management interface
user.cust_notes	Adds a note box	In the user management interface
user.cust_int1	Adds a numeric field only	In the user management interface
user.cust_int2	Adds a numeric field only	In the user management interface

7.1.3 VIEWS - Customizing Lists and Creating Views



Customizing Lists

A **View** in SysAid loads field items you have selected to appear on the screen. The view has a name and is easily selected from the **View** dropdown menu located at the top of the page (to the right of the icons).

Views determine which values, and which of their columns (such as “title” or “priority”), appear in lists. Using different views means listing different values and showing different fields. One view, for example, might show only the title and description of new service requests. Another view might show only the category and priority of closed service requests.

You can create your own views. Some views, such as **EndUser**, arrive with the system. The **EndUser** view, for example, controls the lists end users see when viewing their old service requests (End User Portal).

You can create a new view for printing purposes and select only those fields necessary.

Creating a New View or Editing a Current View

Above lists such as Service Request list, Activities list, or Project and Task List, there is a **View** field. Click the current view name to see a dropdown list with the names of views you can choose to load. Choose a view you would like to edit. For example, to configure which fields end users will see when they check their old service requests, choose the EndUser view.

46 Choose View



The screenshot shows the SysAid Service Desk interface. A dropdown menu is open, allowing the user to select a view from a list. The dropdown is currently set to 'DEFAULT'. Below the dropdown, there are filters for 'SR Type' (set to 'All') and 'Status' (set to 'Active'). To the right, there are filters for 'Group' (set to 'All Groups') and 'Category' (set to 'All Categories'). The main table displays a list of service requests with the following columns: #, Alert, Category, Title, Description, Status, Request user, Assigned to, Urgency, and Due Date. The table contains 11 rows of data, including requests for 'Basic Software', 'Data Center', 'Network Equipment', and 'User Workstation'.

#	Alert	Category	Title	Description	Status	Request user	Assigned to	Urgency	Due Date
5		Basic Software	Install Visio on oded's	Install visio	Being Analyzed	SysAid	oded.moshe	Urgent	
10		Data Center	Data center down for	Need to go down for electricity maintenance.	New	SysAid	oded.moshe	Very High	
13		Data Center	Schedule shutdown of	Shutdown data center process	New	oded.moshe	oded.moshe		
14		Network Equipment	Main Firewall is down ooo	Our main firewall is down. We are working on the	New	SysAid	oded.moshe	Urgent	
18		Servers	Reset password in	User either forgot password or was blocked.	New	oded.moshe	oded.moshe	Very High	3/24/09 11:23 AM
19		Network Equipment	Can't access a webpage -	I am trying to access http://	New	oded.moshe	oded.moshe	Normal	
20		Network Equipment	The Internet seems to be	Web Pages are taking ages to load.....	New	Christina Aguilera	none	Normal	
21		User Workstation	paper stuck in printer	Paper is stuck in the printer. Please assist.	New	oded.moshe	oded.moshe	Low	4/1/09 11:24 AM
25		Data Center	Schedule shutdown of	Shutdown data center process	New	oded.moshe	oded.moshe	Very High	
26		none	SysAid ITIL Problem	SysAid ITIL Problem	New	SysAid	oded.moshe		

To the left of the **View** dropdown menu you can see some icons. Click on the



Customize icon. A new screen will open.

At the top of the screen two lists appear:

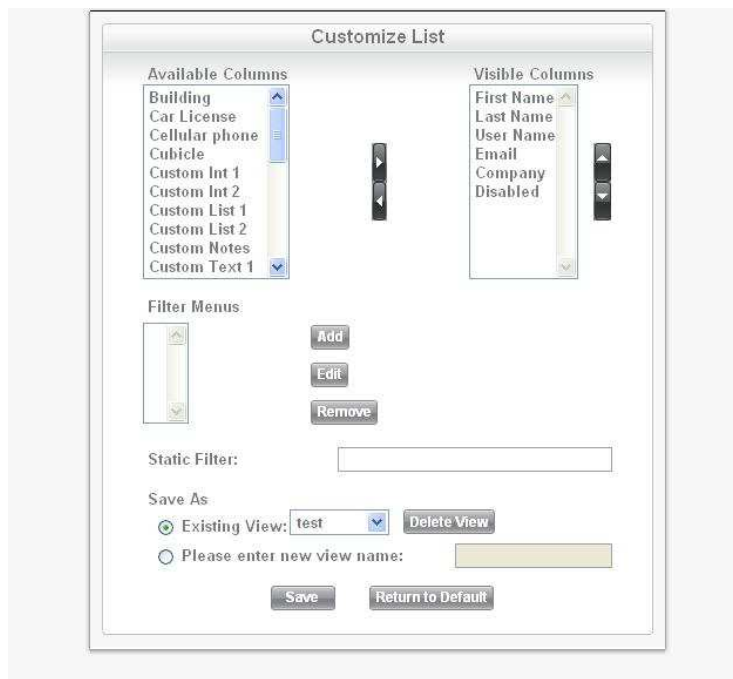
- Available Columns, which shows the columns available for viewing in the list

- Visible Columns, which shows the columns currently used in the list

To customize the columns in the view, use the arrow buttons to move columns between “available” and “visible”. Also, use the arrow buttons to change the order of the visible columns. If you are editing the EndUser view, for example, place into “visible columns” the service request fields you want end users to see.

To create a completely new view, once you have selected the fields to appear in the visible columns and the order they will be shown, go to **Save as** and select the "Please enter new view name" radio button. Finally name the view. Click the **Save** button.

47 Customize List



The **Return to Default** button returns the view to its original configuration.

A note about changing the view name

Ensure that when you create a new view you click on the:

"Please enter new view name" radio button and give the view a new name.

If you will not do so, your new view will be saved as "Default" view and therefore you will lose your original default settings. Making changes to a view and saving them as a Default view is not advisable, as it will seriously interfere later on with downloading new SysAid upgrades.

Dropdown (Filter) Menus

Decide which dropdown menus you would like to appear.

You may decide whether to sort the dropdown lists alphabetically or according to ID under **Preferences → Customize → Customized lists**.

The following dropdown (filter) menus appear as default already in SysAid:

Service Request List:

- Status
- Assigned to
- Group
- Category
- Urgency
- Priority

Asset List:

- Group
- Belongs to
- Type

Project List:


- Category
- Status
- Manager

Task List:


- Project
- Category
- Status
- User

If you would like to add another dropdown filter, please contact our support team support@sysaid.com and we will help you to create additional dropdown menus.


Removing Dropdown (Filter) Menus from a View

1. To remove a dropdown menu from a view go to the relevant page and click on the  **Customize** icon.
2. In the **Customize List** popup screen, select from the **Filter Menu** the dropdown menu you wish to remove. Now click the **Remove** button.
3. Save this view, either by selecting a name from **Existing view:** (dropdown menu) or by selecting and creating a new view name. Do not save these changes to the **Default** view.
4. Click the **Save** button.

To reinstate the dropdown menu at a later date, from the **Customize List** popup screen, you have two options. Either:

1. Click on the **Return to Default** button; all the dropdown menus will be reinstated. Now save this view.
2. Alternatively go to a different view that contains the dropdown menu you wish to reinstate. Click on the  **Customize** icon. From the filter menu click on the dropdown menu you want to reinstate, click the **Edit** button. A **Filter Menu** popup screen will open.

48 Filter Menu

3. Make a note of all the filter and menu field details or print the page off as you will use them to reinstate this dropdown menu in your own view (see step 5).
4. Now go to the View that is missing in the dropdown menu. Click on the  **Customize List** icon; in the **Filter Menu** box click the **Add** button.
5. Proceed to complete all the blank caption boxes in the **Filter Menu** box (using the details you printed off in step 3). Click **Close**.
6. You will be returned to the **Customize List** popup screen, now **save** the view.
7. Finally press the **Save** button.

Option - Setting up a Static Filter within a View - Contact SysAid for Assistance.

No need to worry that your employees have reviewed and responded to all outstanding urgent service requests or tickets. With a static filter in SysAid you can command SysAid to list in the view those service requests that meet certain criteria. This will help to maintain the high standard of service your help desk provides.

A static filter can determine that certain fields will always be included in a certain view, even if not chosen in the dropdown menu. For instance, if you wish to ensure that the view used by employees will always contain certain kinds of service requests, such as new, open, and responses to previous emails, this can be set up in static filters. Escalation rules can be built into the static filter as well, so that your organization can ensure that it does not overlook any outstanding requests or issues.

Contact support@sysaid.com with a design for the static filter and we will help you set it up.

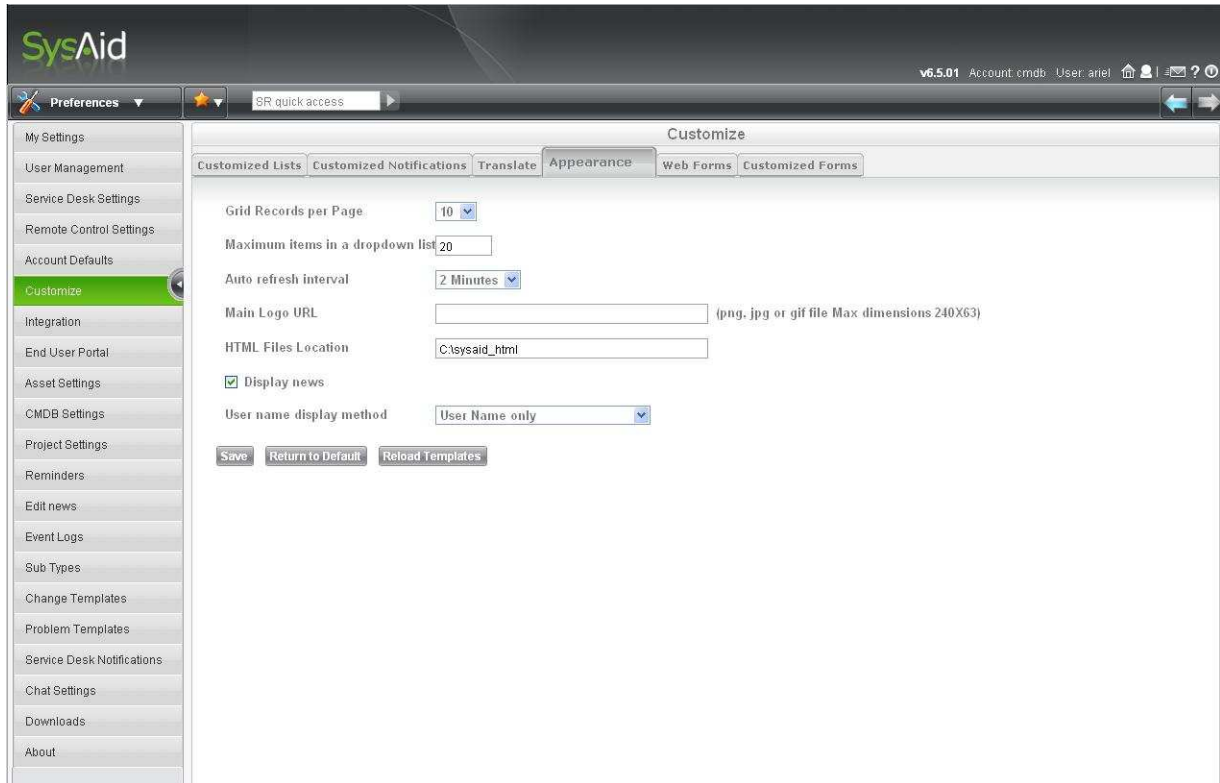
For creating static filters, you need to understand relational databases and have a familiarity with the database used by SysAid. Describing the structure of the database used by SysAid is beyond the scope of this manual.

Please consult *Guide 9: the database* guide for this information.

http://helpdesk.ilient.com/CustomPage.jsp?pageName=download.html&fileName=database_guide.pdf&EndUserLink

7.1.4 Appearance Tab

49 Appearance Tab



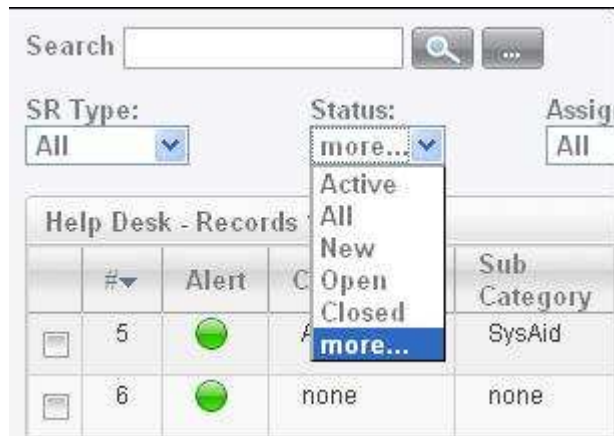
The **Appearance Tab** presents the administrator with the opportunity to customize the SysAid interface with his/her own selection of **colors**, **font settings** and determine the **Auto refresh interval**.

Under this tab you can decide how many lines you will be able to see in all your SysAid lists. Go to **Preferences**→ **Customize**→ **Appearance** tab, and choose from the dropdown menu your desired grid records per page.

You can also choose to customize your dropdown menus and ask SysAid to present the dropdown menu in a separate popup screen for longer lists. Choose the maximum items that will appear in a combo box (dropdown menu). If the list contains more than the number you have set, instead of a dropdown menu,

a button will appear and allow you to open the list in a separate popup screen where you can search sort and select the values.

50 Dropdown menu with an option to see as a separate popup screen.



There is also the option of adding your company logo URL. *However, these options are only available in the full edition of SysAid.* To learn more about the SysAid Full edition, please follow this link: <http://ilient.com/fullversion.htm>

Edit the HTML and Upload Changes in the Appearance Page

SysAid interface is displayed using HTML code. If you are familiar with HTML code, you can edit the **End User Portal** and Login pages.

1. Go to ...\\SysAidServer\\root\\WEB-INF\\conf\\.
2. You will find a folder called 'html'. Copy this folder to another location - preferably, not in the SysAidServer folder).
3. Edit the HTML files in the new location, design the appearance which is suitable to you, and save your changes.
4. In SysAid, go to **Preferences → Customize → Customized Forms** tab.

5. In the "HTML Files Location" field, point to the new location of the HTML files. The path you point to should be a full-local path.
6. Save your changes.
7. Click the **Reload Templates** button to update the changes you made in the HTML files. You should always click this button after any change you make to the HTML files.
8. Open the relevant pages to verify that your newly designed End User Portal and Login page are displayed.

One of the options is to create different forms for the **End User Portal** that will be used for submitting service requests that belong to different categories.

Using interfaces other than SysAid to create web forms

SysAid provides you with the option to add service request submission forms to any existing web page. For example, you might want to let users submit SysAid service requests from your company home page. Go to **Preferences → Customize** and go to the **Web Forms** tab. Click **New Form**.

Fill out all the details in the form. Choose fields that you would like to appear in your service request submission form. Preview your form by clicking **Preview**. When you have finished designing the customized form, click on the **HTML Code** tab. Copy the HTML into any existing web page. Users can now submit service requests using your web page.

7.1.5 Tags (for automatic notifications)

Service requests can prompt automatic notifications (messages) in SysAid. These messages are based on editable templates. For example, there is a template for the automatic email notification sent to users who submit a service request. There is another template for the email sent to an administrator when a service request escalates.

These templates use *tags* to make them unique from one another. Tags are placed within the message. They change based on the service request they apply to.

For example, whenever a service request escalates, you may want to email the administrator about it. The template might look like this: "A service request **`\${ID}`** has been escalated". The tag "**`\${ID}`**" marks the number of the service request. Whenever such an email is sent, the appropriate service request number will automatically replace the tag. Choose a notification from the dropdown menu, and edit the text in the text box below it, using the available tags. You may edit the titles of your notifications, too.

The following **tags** build automated messages and are located in **Customized Notifications**, (**Preferences → Customize**) and in the **Escalation Rule** page (**Preferences → Help Desk Settings → Escalation Rule → Click a row entry**) in SysAid. You can set a special notification that will be sent according to an escalation rule you have determined.

Table 4: Tags used in SysAid

Tag	Tag Description
`\${ActionNotification}`	Message to administrator, sensitive to action taken. For example, "You have been assigned to Service Request #100"
`\${StatusNotification}`	Message to submitter, sensitive to status/"assign to" change. For example: "Service Request #100 has been closed."
`\${Title}`	The title of the service request
`\${ModifyUser}`	The user who modified the service request
`\${Account}`	The account the service request exists in
`\${Computer}`	The computer the service request applies to
`\${Category}`	The category of the service request

Tag	Tag Description
`\${SubCategory}`	The subcategory of the service request
`\${ThirdLevelCategory}` -	The third-level-category of the service request
`\${AssignedTo}`	The administrator the service request is assigned to
`\${AssignedGroup}`	The administrator group that is assigned to the service request
`\${CloseTime}`	The time the service request was closed
`\${Description}`	The description of the Service Request
`\${DueDate}`	The date the service request is due
`\${LinkToSR}` -	A link to the service request - possible for administrators only
`\${Company}`	The company name that is associated with the request user
`\${Phone}`	The request user's telephone number
`\${Cellphone}`	The request user's cellular phone number
`\${SMS}`	The request user's SMS number
`\${CompanyAddress}`	The email address of the request user's company
`\${ID}`	The ID number of the service request
`\${SubmitTime}`	The time the service request was submitted
`\${Notes}`	The notes written in a service request
`\${Priority}`	The priority of the service request
`\${Urgency}`	The urgency of the service request
`\${Status}`	The status of the service request
`\${RequestUser}`	The user who requested the service request
`\${Resolution}`	The resolution of a service request

Tag	Tag Description
`\${Solution}`	The solution of a service request
`\${SubmitUser}`	The user who submitted the service request
`\${ModifyTime}`	The time the service request was modified
`\${Location}`	The location the service request applies to
`\${ParentID}`	The ID of the parent service request
`\${CompanyPhone}`	The telephone number of the company of the end user
`\${sr.custText1}`	This is a customized text of the service request.
`\${sr.custText2}`	This is a customized text of the service request.
`\${sr.custInt1}`	This is a customized integer of the service request.
`\${sr.custInt2}`	This is a customized integer of the service request.
`\${sr.custList1}`	This is a customized list of the service request.
`\${sr.custList2}`	This is a customized list of the service request.
`\${LinkToAttachments}`	This tag creates a link to download the files attached to the service request
`\${Total_Active_Requests}`	Adds the current number of active service requests.
`\${Active_requests_for_assigned_admin}`	Adds the number of the active service requests of the assigned administrator to the notification
`\${Timestamp}`	This tag contains the date and time of the monitoring event.
`\${EventTime}`	This tag uses the default server time zone.
Boolean variables for using in customized notifications*	
`\${IsNewSr}`	Returns True if this is a new service request

Tag	Tag Description
\$isClosedSR	Returns True if this is a closed service request
\$isAfterHours	Returns True if the notification is sent outside of the operating hours
\$AssignedTo.FirstName	The first name of the administrator to whom the request is assigned
\$AssignedTo.LastName	The last name of the administrator to whom the request is assigned
\$ActivitiesTable	Available for service requests notifications. Contains the service request activities
\$ActivitiesNum	Presents the number of the service request activity.
\$ActivitiesTotalMinutes	Presents the total time (in minutes) of all the activities of the service request.

*Boolean variables can be used in cases you want a different message to be sent in specific cases. For instance, if a service request is sent when the helpdesk is closed you can use the tag \$isAfterHours in the following way:

```
#if( ${AfterHours} && ${AfterHours}==true && ${IsNewSr}==true)
```

The Helpdesk is not active at the moment, your service request will be addressed during working hours.

```
#end
```


The texts in **Customized Notifications** can (and should) be enhanced with tags.

Quicklists

SysAid allows you to create templates for service requests. These templates can save time for both your administrators and your end users. The quicklists present common issues for service requests in a dropdown menu. Once the end user or the administrator chooses the SR subject from the quicklist, SysAid will populate all the other fields in the request according to the settings you have determined.

Here is a useful tip: gathering together the most common re-occurring issues in your IT environment, and making them available as quicklists, can bring you closer to a smoother implementation of SysAid End User portal. Your end users will not need to search through the categories and type the title and description for their service requests. In addition, your administrators will avoid reading through long and various descriptions of users want to report a simple and recurring problem, for instance, that there is a paper jam in their printer.

To enable the quicklist option for your end users, check the appropriate box in the **Preferences→ End User Settings** page.

To edit the quicklist according to your preferences, go to: **Preferences→ Helpdesk Settings→ Quicklist** tab. Click to modify or delete you quicklists, or click the **New** icon  to create a new quicklist.

When creating or modifying a quicklist you can determine the different settings that will be automatically determined for the SR once the topic of the list is chosen: category, title, status, urgency, priority, to whom the SR will be assigned, what attachments will be added to the SR, and other custom fields you can add according to your needs. Note that quicklist subjects appear in the dropdown menu grouped according to their class. Here you can determine which class your quicklist will belong to.

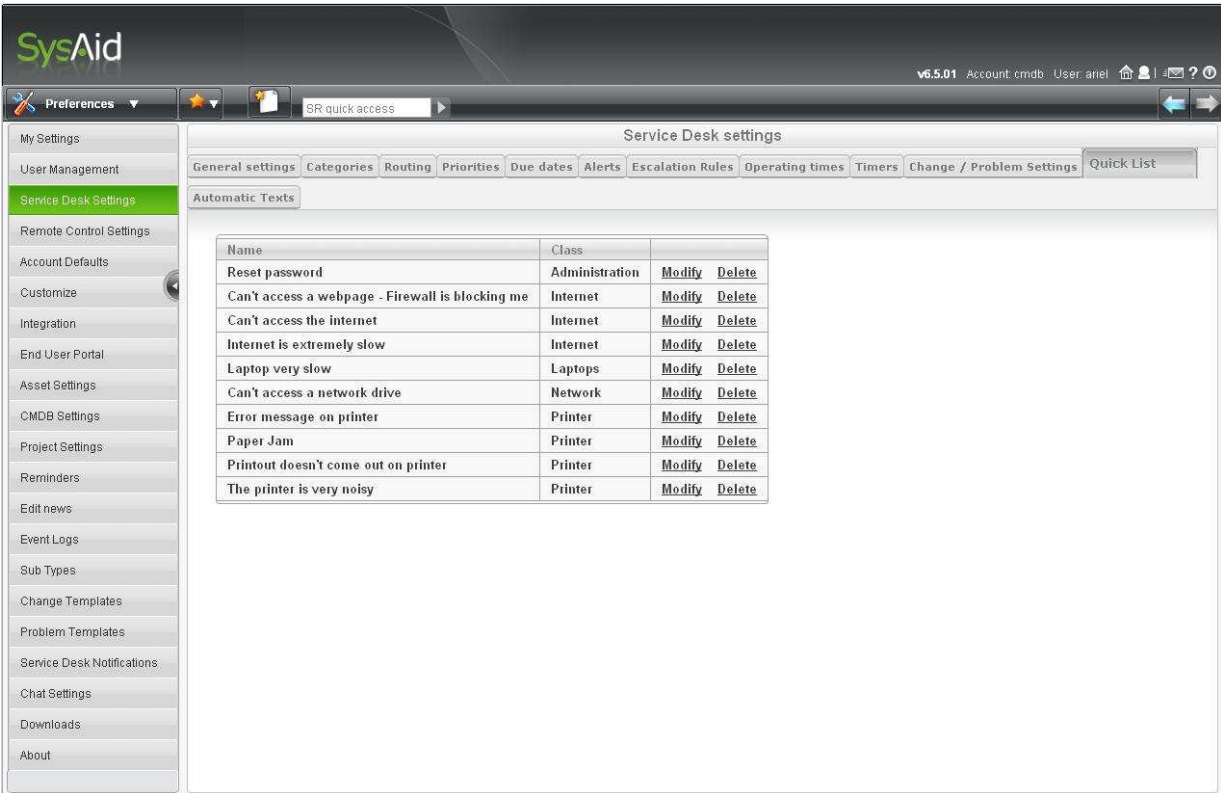
51 Quicklist topics are organized according to classes

The screenshot shows the SysAid Service Desk interface. On the left is a sidebar with navigation links: All, Incidents (highlighted), Change Requests, Problems, Service Request Actions, Matrix, Phone Call, New SR, Mobile, Search, Activities, and Knowledge Base. The main area is titled 'Help Desk - Service Request # New' and contains a form with tabs: General Details, Description, Solution, Activities, Messages, History, Business Impact, and Customized Printout. The 'General Details' tab is active. The form fields include: Quick List Description (a dropdown menu with 'Paper jam in printer' selected), Category (a dropdown menu with 'Laptops', 'Printer', and 'Security' visible), Title, Status, Urgency (a dropdown menu with 'Please select an urgency.'), Priority (a dropdown menu with 'Default value'), Due Date (a date picker), Asset (a text field with 'none' and a 'Change' button), Submit user (a text field with 'ariel' and a 'Change' button), Request user (a text field with 'ariel' and a 'Change' button), Assigned to (a dropdown menu with 'ariel - Ariel'), Admin group (a dropdown menu with 'none'), and Parent ID (a text field).

For example you can create a template for a service request for re-setting a password. This quicklist template would be relevant for the administrators. The SR template may include a title such as 'A need to reset a password', a category and sub-categories, such as 'Servers' and 'Permissions', and a description, that contains instructions for the administrators on how to reset the password.

An example for a quicklist template for end users can be, for example, 'Cannot access a webpage because of Firewall block'. The category in this case would be 'Internet' and a sub category could be 'Firewall'. You can specify in the description field how the firewall block on certain websites can be removed.

52 Quicklist setting- general details



The screenshot displays the SysAid web interface. On the left is a navigation menu with options like 'My Settings', 'User Management', 'Service Desk Settings' (which is highlighted), 'Remote Control Settings', 'Account Defaults', 'Customize', 'Integration', 'End User Portal', 'Asset Settings', 'CMDB Settings', 'Project Settings', 'Reminders', 'Edit news', 'Event Logs', 'Sub Types', 'Change Templates', 'Problem Templates', 'Service Desk Notifications', 'Chat Settings', 'Downloads', and 'About'. The main content area is titled 'Service Desk settings' and contains several tabs: 'General settings', 'Categories', 'Routing', 'Priorities', 'Due dates', 'Alerts', 'Escalation Rules', 'Operating times', 'Timers', 'Change / Problem Settings', and 'Quick List'. The 'Automatic Texts' tab is selected, showing a table of predefined messages.

Name	Class	Modify	Delete
Reset password	Administration	Modify	Delete
Can't access a webpage - Firewall is blocking me	Internet	Modify	Delete
Can't access the internet	Internet	Modify	Delete
Internet is extremely slow	Internet	Modify	Delete
Laptop very slow	Laptops	Modify	Delete
Can't access a network drive	Network	Modify	Delete
Error message on printer	Printer	Modify	Delete
Paper Jam	Printer	Modify	Delete
Printout doesn't come out on printer	Printer	Modify	Delete
The printer is very noisy	Printer	Modify	Delete

7.2 Automatic Texts

SysAid enables composing a list of generic texts that can be easily added to the messages administrators compose. Under **Preferences**→ **Service Desk Settings**→ **Automatic Texts** tab, you can create and modify such texts, that will save you time while composing the messages to end users. Such texts can be an apology for a delay in service, holiday greetings, or any other text you can use in many of your sent messages. You may build separate texts for your admin groups and each user will see the relevant automatic text of his group.

7.2 Backup your SysAid Database

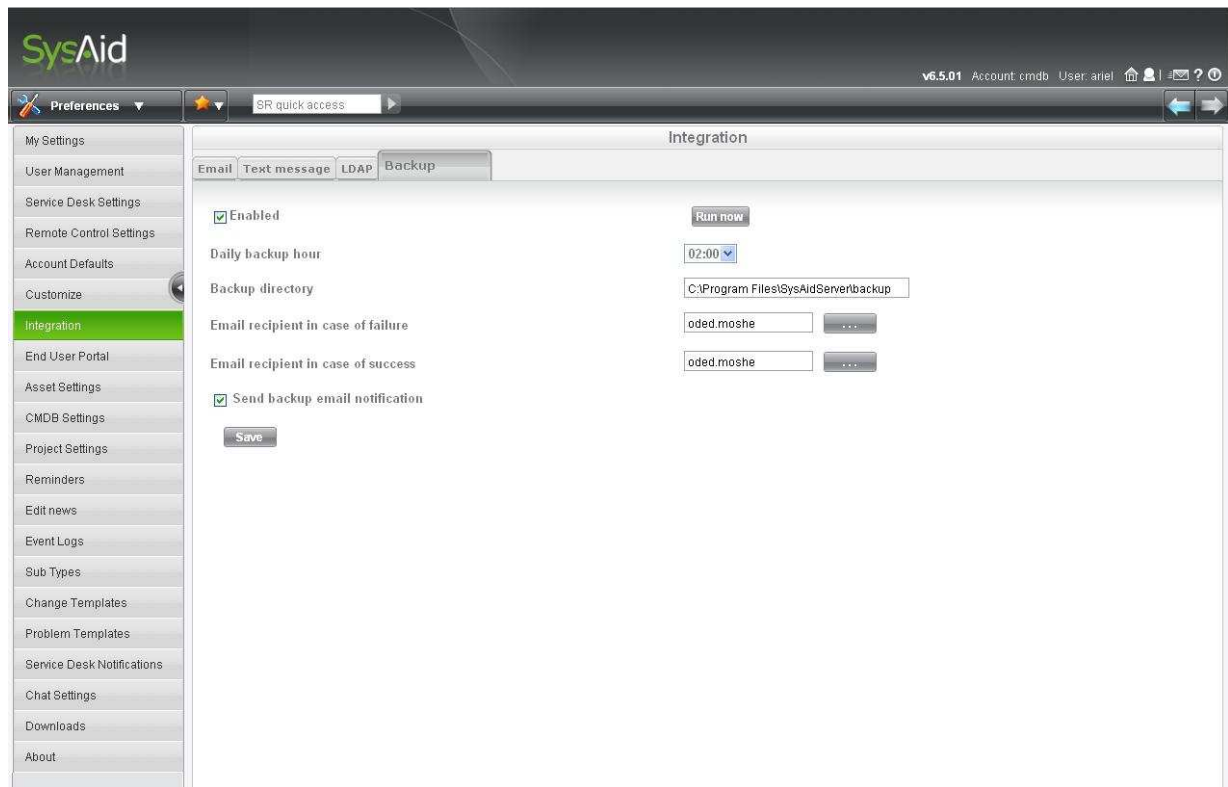
You do not have to use external database to enjoy backup capabilities. SysAid supports backup in its internal databases.

To create a backup to your database:

1. Go to: **Preferences → Integration → Backup** tab
2. Check the box to enable the backup.
3. If you are about to perform an action which could cause a database corruption, you can create a backup at once by clicking the **Run Now** button.
4. To configure a backup of the database on a regular basis enter a time for the regular backup, the directory for your backup, and administrators who will receive email notifications when the backup was successful and when it has failed.
5. Save your data backup preferences. The backup is always for the most recent seven days.
6. Note that this SysAid internal backup feature is only available with the built-in databases Derby.

When using Derby database, SysAid sends an email notification of failure or success of the backups, either to the administrator you have selected, or by default to the main administrator. Click the buttons with three dots on to choose the administrators you wish to send the failure/success notifications to. You can also opt not to receive any notification regarding backups, by un-checking the box: 'Send backup email notification'.

53 Database Backup



Reminders

Under Preferences → Reminders SysAid includes an option to set reminder notifications on several date fields in SysAid including : Assets, Catalog items, Software products, suppliers, CI-s and projects and tasks. For example you can set a reminder email thirty days prior to a software expiration date or an asset

warranty expiration date. You can also set a notification when you have exceeded the number of licenses you have.

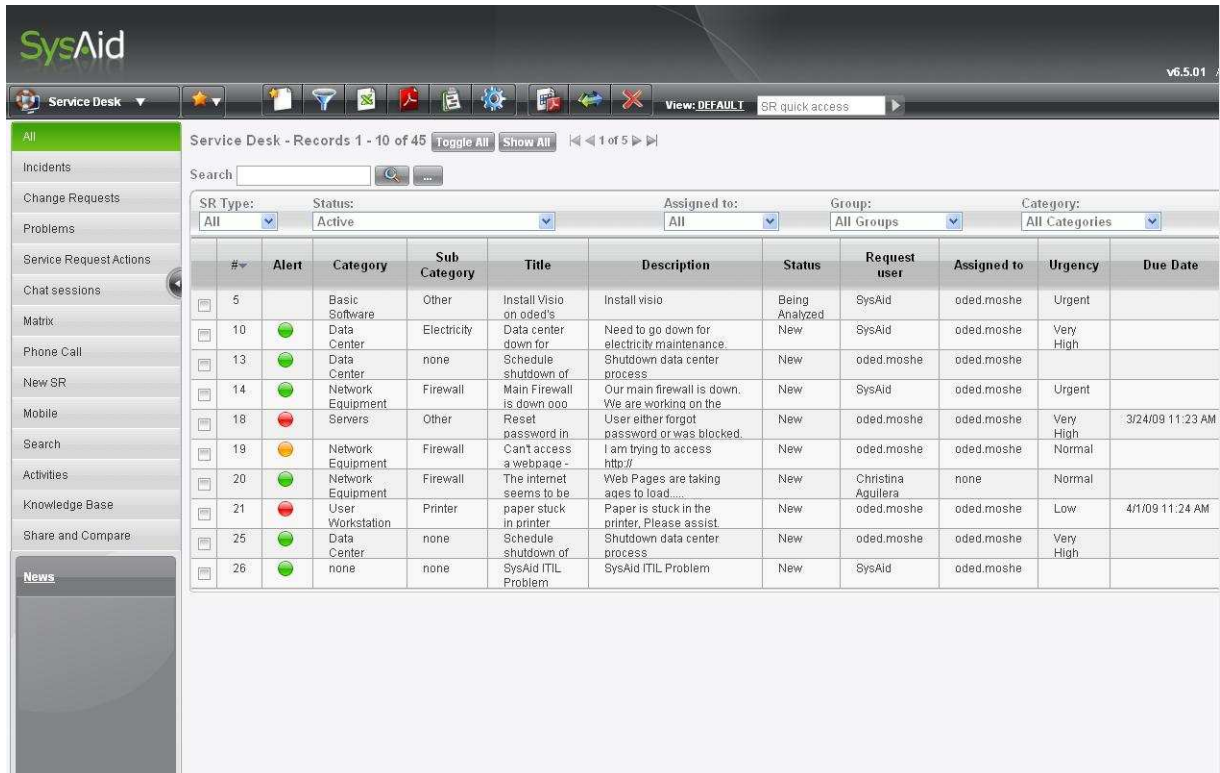
7.3 Administrator Mini User Guide

In chapter 4, we reviewed the basics of the Help Desk; here is a brief overview of other features available for administrators.

Using Lists

Accumulating service requests are stored within lists. Upon entering SysAid go to **Help Desk**, in the **Status** dropdown menu, click on **Open**. Now all open service requests will be listed. SysAid lists are a useful feature, enabling the easy filtering, sorting, and viewing of information. They appear throughout the software (Service Request List, Asset List, Activities List Project List and Task List).

54 A SysAid List



#	Alert	Category	Sub Category	Title	Description	Status	Request user	Assigned to	Urgency	Due Date
5		Basic Software	Other	Install Visio on oded's	Install visio	Being Analyzed	SysAid	oded.moshe	Urgent	
10		Data Center	Electricity	Data center down for	Need to go down for electricity maintenance.	New	SysAid	oded.moshe	Very High	
13		Data Center	none	Schedule shutdown of	Shutdown data center process	New	oded.moshe	oded.moshe		
14		Network Equipment	Firewall	Main Firewall is down ooo	Our main firewall is down. We are working on the	New	SysAid	oded.moshe	Urgent	
18		Servers	Other	Reset password in	User either forgot password or was blocked. I am trying to access	New	oded.moshe	oded.moshe	Very High	3/24/09 11:23 AM
19		Network Equipment	Firewall	Can't access a webpage -	http://	New	oded.moshe	oded.moshe	Normal	
20		Network Equipment	Firewall	The internet seems to be	Web Pages are taking ages to load...	New	Christina Aguilera	none	Normal	
21		User Workstation	Printer	paper stuck in printer	Paper is stuck in the printer. Please assist	New	oded.moshe	oded.moshe	Low	4/1/09 11:24 AM
25		Data Center	none	Schedule shutdown of	Shutdown data center process	New	oded.moshe	oded.moshe	Very High	
26		none	none	SysAid ITIL Problem	SysAid ITIL Problem	New	SysAid	oded.moshe		

Controlling Lists

You can sort a list by clicking the title of a column. The list will be sorted according to that column. To change the order of the sorting, click the column title again.

You can perform actions on list items. Check the items relevant for you, and then choose an action from the top menu bar buttons. You can toggle between selected items using the “Toggle All” button, at the top right corner.

View all the items by using the “next” and “previous” buttons or by choosing “Show All”, which will display all the items in a single page.

Replying to Service Requests

Click on the row entry of the service request from the list; this will open the service request. To reply to an end user, click on Send Message, at the bottom of the page. A popup box will open; enter your text in the email box and then click the **Send** button. This reply and any other responses will be registered and can be viewed fully in the **General Details** page of that service request.






Send Message Option

At the bottom of the page you will see a **Send Message** link. Click on **Send Message** to email, SMS or send an instant message to a user. A popup box opens, in the **Method** field a dropdown menu can be accessed to select the type of message you want to send.

All outgoing and incoming emails regarding a specific service request can be found under the messages tab. In order to see them, you need to make sure you have sent emails from within the service request. Then, all the outgoing emails you have sent to end users, and all their replies to you, will be listed here.

Icons

In the **Service Request/Asset/Project/Task/Activities List** pages, five icons are positioned in the upper left hand side above the Status bar.

Icon	Icon Name	Description
	New	Adds a new item to the list.
	Filter	Open the filter builder popup screen.
	Export to CSV	Data can be transferred into the Excel spreadsheet.
	Print	Turns the text into a PDF file, with options to print.
	Customize	Add or delete fields that appear in lists and forms



New

Click this icon to add a new item to the list. For example, when viewing a list of service requests, clicking this icon lets you add a new service request. Similarly, when viewing a list of assets, clicking the icon lets you add an asset.



Filter

The second icon is the filter icon. Clicking the icon takes you to SysAid Filter Builder. With the Filter Builder you can create a filter to return only the results you need. For your filter, choose between creating a simple “statement”, an “and” expression, or an “or” expression. A simple statement includes an element (such as “priority”), an operator (such as “equals”), and a value (such as “urgent”). The above example would allow only results with an urgent priority.

You can also create and/or expressions, connecting simple statements using Boolean logic. If statements are connected by an “and”, both must be true for the result to be returned. If an “or” connects them, one or both must be true.

While creating an expression, clicking on **Add New Line** adds another simple statement.



Export to CSV

This icon appears where data is summarized in list format. By clicking on this icon SysAid transfers the list data into the Excel spreadsheet.



Print (PDF Creator)

The fourth icon, the **Print** icon, turns the fields related to the page you are viewing into PDF and provides you with the option to print.



Customize

By using the **Customize** icon, you can add or delete fields in the list or the form on the screen you are currently viewing. The option to add filter menus is also offered via this icon.

Note that you can update the following fields at once in the helpdesk list:
Status, Priority , Urgency , Custom lists1 Cust List 2 , Assigned to.

Understanding Views and their Importance in SysAid



Customizing Lists

A **View** in SysAid loads field items you have selected to appear on the screen. The view has a name and is easily selected from the **View** dropdown menu located at the top of the page (to the right of the icons).

In SysAid you will encounter views; you can select a particular view in the following interfaces:


- **Service Request List** and the **Activities** page (Help Desk)
- **Asset List, Software Products, Catalog and Supplier List** page (Asset Management)
- **Project List, Task Activities List** (in the **Tasks/Projects** interface).


The **Views** function determines which values, and which of their columns (such as “title” or “priority”), appear in lists. Using different views means listing different values and showing different fields. One view, for example, might show only the title and description of new service requests, whereas another view might show only the category and priority of closed service requests.

Printing Options

In SysAid you may want to print out a single service request, entire service request listings, the complete history for a number of service requests, or customize your own page.


Using the print icon


Click on the print  icon. The page will open the document in PDF format. At this stage the page will not yet be sent to print. The PDF document contains a summary of the service request/s, based upon the details entered in all of the six pages (General Details, Description, Solution, Activities, Messages,


History). You can also print unicode characters using the print icon . Note that the PDF document holder contains the vertically placed Attachments and Comments tabs. These tabs are automatic additions from Acrobat and are not functional for documents exported from SysAid.

To print the PDF summary click the print icon on the toolbar inside the PDF interface screen. Alternatively you can save the file.

Customized Printout


The  **Customize Printout** icon. This icon allows you to merge the data in the service request to your customized printout, from within the service request. More details about this option can be found under section 4.1 in this guide

If you would like to print only selected items from a service request, for example only four fields, you can customize this by creating a new page, by clicking on the  **Customize Printout** icon.


The **Design Form** screen will open. Choose the fields to appear on the printout from the **Available Fields** box, and by using the arrow button move them to the **Visible Fields** box. For the **Page** field choose from the dropdown menu, **New**. In the page caption type a new name for this page, for example "**Printout**". Click **Save**; SysAid will now add a new page tab called **Printout** and this will be located next to the **History** tab. Click on the **Printout** tab, to proceed to print the contents of the page. Click the Print icon  to print the page.


Export to Microsoft Excel and Print

If you have hundreds of service requests, you may want to print a large quantity of rows of service requests. In this case you can export the data to Excel. From Microsoft Excel you can then select to print one of these rows or a selection of rows and columns. To do this, go to the page you want to export to Excel (**Help**

Desk List or Tasks/Projects List). Click on the Excel  icon, a popup screen will open, and you will be asked if you want to open or save the file. Make a choice. Click **Open**; data will be immediately transmitted to an Excel table. Click **Save**; you will be prompted where to Save it. Then a popup box will give you the option to open the file. You can now highlight the relevant rows and print them, while de-selecting those columns you do not need.

Additional icons available from within the service request

The  **Duplicate Service Request** icon allows you to create a new service request identical to the one you are viewing. To learn more about this option, go to **Duplicating a Service Request** under section **4.1** in this guide.

The  **Create new linked Change/Problem** icon allows you to link the current service request to a new change process or a new problem process. Learn more about this option in the **ITIL Package Guide** that can be found in the SysAid Website, on page http://ilient.com/contact_support.htm

To check the spelling in your service request, click the  **Check Spelling** icon

Chapter 8 Managing Help Desk - Advanced Settings

In this chapter we will proceed to set up some advanced configurations in the help desk. You first need to configure the help desk for your local environment; this is done by customizing the status, urgency and priority menus, if necessary, and setting up routing rules. Once you have made these configurations you can then get SysAid to send e-mail or SMS notifications to an administrator, an option described in the second part of this chapter.

8.1 Help Desk Settings

Service request are queued according to categories, priority and urgency.

- ➡ Statuses
- ➡ Urgency
- ➡ Priority Rules
- ➡ Alerts
- ➡ Due Dates
- ➡ Escalation Rules
- ➡ Operating Times

Statutes

A service request has a life cycle. Upon entering help desk the service request is assigned a **New** status. Depending upon your local in-house policy you should define the point when a request becomes **Open**, maybe at dispatch upon entering the help desk or only when the assigned administrator reads the service request. This change in status is important, as later on you can take advantage of monitoring response times from the opening of a service request until it is closed (Operating Times). Another useful result is the ability to receive color alerts signaling when a request fulfills certain conditions (Alerts).

You can determine that certain fields in the service request will be obligatory, and that the administrator will have to fill them when the Service request is in certain statuses. For instance, it may be logical to define that in order to move a SR to the status “closed”, the solution field should be filled out by the administrator.

You should prepare your own in-house coding scheme for Statutes that will describe the transient stages a service request goes through from entering help desk (New) until it is closed. For example statuses can change from **New** → **Open** to help you manage your incoming service requests.

Set up customized status menus

See **section 7.1.2 Adding your own customized list**, for further instructions.

Urgency

1. The end user sets the urgency within the end user portal/interface when completing the service request form. The default menu settings (Low, Normal, High, Very High, Urgent) can be changed, or the menu can be extended by the administrator. SysAid converts the urgency level to a priority number, so you should ensure that the same numerical coding system is used and the same increments are used. You should retain the

1-5 coding system. Please note - 1 is the highest number, with the highest level of alert and 5 the lowest number. (See Chapter 7 Advanced Configurations for all modules).

55 Setting up the urgency menu

SysAid v6.5.01 Account: cmdb User: ariel

Preferences SR quick access

My Settings
User Management
Service Desk Settings
Remote Control Settings
Account Defaults
Customize
Integration
End User Portal
Asset Settings
CMDB Settings
Project Settings
Reminders
Edit news
Event Logs
Sub Types
Change Templates
Problem Templates
Service Desk Notifications
Chat Settings
Downloads
About

Customize
Customized Lists Customized Notifications Translate Appearance Web Forms Customized Forms

Please choose from the menu a list to customize.

List **Urgency** Sort By **Key**

Key	Caption	Valid for user groups	Actions
			Add
1	Urgent		Delete
2	Very High		Delete
3	High		Delete
4	Normal		Delete
5	Low		Delete

Note: if no user group is selected, the value is valid for all user groups.

Save

Priority Rules

A service request has a priority. The priority is set automatically when the help desk receives the service request. A priority indicates the level of attention or precedence rating given to a service request. Priorities are **set by the administrator**. There are two ways to set up priorities in help desk.

1. You can assign one priority level to all incoming service requests irrespective of the asset they relate to.
2. Alternatively you can create priority rules that relate to assets, asset groups, department, user or company. For example service requests

relating to assets of senior management may be given higher priority than an asset of a junior member of staff, or requests from the communication department in a certain organization can automatically receive a higher priority than the archiving department.

Both options described above operate on a coded priority menu and this is the first thing you should set-up.

1. You can set up a coded priority menu by going to **Preferences → Customize → Customized List**.
2. Select from the **List** drop-down menu **Priority**. Here you will see the default coding from 1-5. **Please note - 1 is the highest number, with the highest level of alert and 5 the lowest number.**
3. Now add your own coding.
4. In the **Key** box, you should use a numeric figure. You should use the same coding system for the **Urgency** menu. If you change the coding, you should be aware that SysAid converts the urgency level to a priority level; therefore it is important to ensure that you use the same increments and coding system to aid this conversion. Finally do not punctuate numbers with commas (,) or full stops (.)
5. Add the text description in the caption box. Click **Add** to save this line entry.
6. Once you have added all entries to the menu, click **Save**.

Your priority menu is now set-up.

Option 1: Create a default priority

This default setting instructs SysAid on the priority setting to be given to all new service requests.

1. Go to **Preferences → Help Desk Settings → General Settings**.
2. On the **General Settings** page you will see the following default setting, which is active. This default setting gives all new service requests the priority of **Normal**, when sent via the End User Portal or via e-mail. Even if a service request has an urgency of Very High or Low, the priority will automatically be set by SysAid to Normal.

New Service Request default priority Normal

3. You can change the default priority setting by clicking on the dropdown menu. You set up your coding menu earlier. You will notice that within the dropdown box you have the option to set a priority to the urgency. The urgency is chosen by the person who submitted the service request. To make the priority level sensitive to the urgency level set by the end user, click on the dropdown menu and select = Urgency.

Exclusions: Even though the default priority is active and takes effect on all new service requests, there are three instances when the default priority will not take effect:

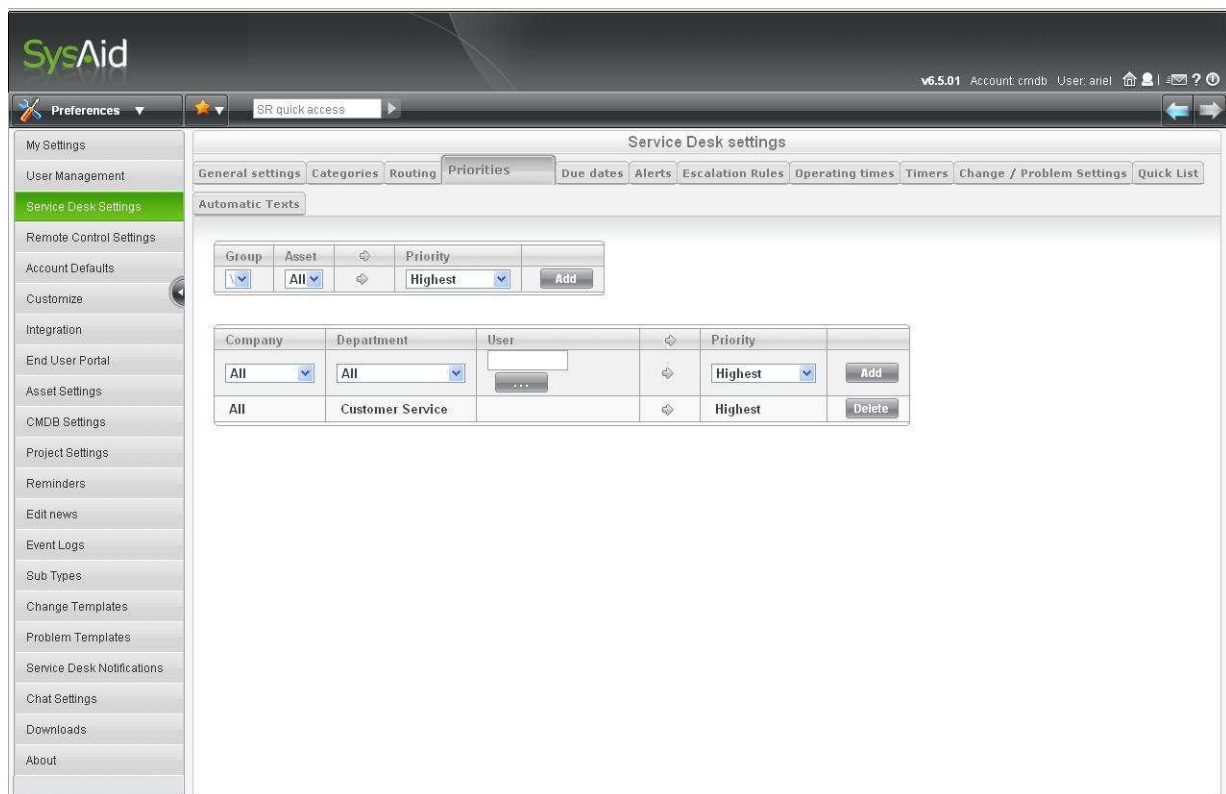
- 4.1 When an administrator creates and sends a new service request from the administrator interface.
- 4.2 When the end user portal has been modified and the priority field is made available for end users to submit new service requests via the Submit Service Request Form.
- 4.3 When a priority rule has been set up (see below), all those new service requests that meet the criteria set in the priority rule will not be covered by the default priority setting. Those not covered by the priority rule will be governed by the default priority setting.

Option 2: Create Priority Rules according to asset, asset group, department, company or user.

You can create rules for automatically assigning different priorities for incoming service requests.

1. Go to **Help Desk Settings** → **Priorities** tab. This screen lists priority rules. You can select from the dropdown menus an asset, a group of assets, a company, a department, or browse for a particular user. Note that your network information, such as assets, users, companies and departments, should be set beforehand.
2. Next, choose the priority level for service requests according to: asset, a group of assets, company, department or user. Whenever a service request is submitted, if a priority rule exists for the asset, asset group, company, department or user you have specified, the rule will assign a suitable priority to the service request.
3. To delete a priority rule, click **Delete** at the right of the rule.

56 Priorities page



If an element such as asset or company is covered by more than one rule, for example one rule for an asset and another for its group, and perhaps even another rule for a higher-level-group, then the most specific rule is applied.

End users will have to select their asset/company/department in the dropdown menu in the **Submit Service Request** form, so that the priority rules according to these elements will be applied by SysAid. Finally when the service request arrives in SysAid the administrator can go in and reassign the priority.

Alerts

SysAid offers an alert system for service requests meeting certain predetermined conditions. By enabling the alert system one of four colors can appear in the service request list signaling that it has fulfilled certain criteria you have selected.

Create an Alert System

1. To set up this optional alert system, go to **Help Desk Settings** → **Alerts** tab.


57 Alert settings page

The screenshot shows the SysAid interface with the 'Service Desk settings' tab selected. Under the 'Alerts' sub-tab, the 'Enable Alert System' checkbox is checked. Below this is a table for configuring alerts. The table has four columns: Color, Status, Priority, and Escalation. There are two rows visible, each with a color selection box (a red circle icon) and a list of statuses to choose from. The first row has checkboxes for New, Open, Closed, Verified closed, Pending, Postponed, Deleted, Change opened and being analyzed, Change Approved, Change Rejected, Change Completed, Being Analyzed, In Approval Process, In Implementation, In Release, Waiting to be closed, Problem Identified, Problem Solved, Closed unresolved problem, Analyzing the solution for the problem, and Source of the Problem identified. The second row has checkboxes for New, Open, Closed, Verified closed, Pending, Postponed, Deleted, Change opened and being analyzed, and Change Approved. The Priority column has checkboxes for Highest, Very High, High, Normal, and Low. The Escalation column has checkboxes for Escalated and Not Escalated.

Color	Status	Priority	Escalation
<input type="checkbox"/>	<input checked="" type="checkbox"/> New <input checked="" type="checkbox"/> Open <input type="checkbox"/> Closed <input type="checkbox"/> Verified closed <input type="checkbox"/> Pending <input type="checkbox"/> Postponed <input type="checkbox"/> Deleted <input type="checkbox"/> Change opened and being analyzed <input type="checkbox"/> Change Approved <input type="checkbox"/> Change Rejected <input type="checkbox"/> Change Completed <input type="checkbox"/> Being Analyzed <input type="checkbox"/> In Approval Process <input type="checkbox"/> In Implementation <input type="checkbox"/> In Release <input type="checkbox"/> Waiting to be closed <input type="checkbox"/> Problem Identified <input type="checkbox"/> Problem Solved <input type="checkbox"/> Closed unresolved problem <input type="checkbox"/> Analyzing the solution for the problem <input type="checkbox"/> Source of the Problem identified	<input checked="" type="checkbox"/> Highest <input checked="" type="checkbox"/> Very High <input checked="" type="checkbox"/> High <input checked="" type="checkbox"/> Normal <input checked="" type="checkbox"/> Low	<input checked="" type="checkbox"/> Escalated <input type="checkbox"/> Not Escalated
<input type="checkbox"/>	<input checked="" type="checkbox"/> New <input checked="" type="checkbox"/> Open <input type="checkbox"/> Closed <input type="checkbox"/> Verified closed <input type="checkbox"/> Pending <input type="checkbox"/> Postponed <input type="checkbox"/> Deleted <input type="checkbox"/> Change opened and being analyzed <input type="checkbox"/> Change Approved	<input checked="" type="checkbox"/> Highest	

- Click on the box next to **Enable Alert System**. Here, you can create alerts for your service requests. There are four alert colors: green, yellow, red, and flickering red. For each color, you can select statuses, priorities, and a state of escalation (escalated or not escalated). A service request will activate the alert if it meets all the conditions you select. The request must match at least one of the selected statuses, one of the selected priorities, and one of the states of escalation. If you do not choose a status, priority, or state of escalation, the alert will never go off.
- Click the Submit button to set the alert system

How do I see the alert lights?

To see the alert lights in the list of service requests click on the  **Customize** icon.

A popup window will open, in the **Available Columns** click on the **Alert** field, then on the arrow so as to move it to **Visible Columns**.

Alert lights are also visible under **My Network Assets**. They appear for assets, or groups of assets, which are associated with a service request and have activated an alert.


Due Dates

You can define the "due date" a service request will automatically receive. The due date will be calculated based on the category, the sub-category, the third-level category, the urgency and the priority of the service request.

Create Due Dates Rules

Service requests have *due dates* - dates by which the service request must be handled.

SysAid can automatically determine a due date for a new service request, based on predefined rules.

1. To define such rules, go to **Help Desk Settings** → **Due Dates** tab.
2. On the top of the **Due Dates** page, appears a line for adding a new due date rule. Due dates can be calculated based on the category, sub-category, third level category, urgency, and priority of the service request. Create a new rule by selecting parameters. Finally, choose within how many days or hours service requests matching the parameters must be solved.
3. Click **Add**.
4. To see the **Due Date** field in service request list click on the  **Customize** icon. A popup window will open; in the **Available Columns**

click on the **Due Date** field, then on the arrow to move it to **Visible Columns**.

58 Setting up Due Dates

The screenshot shows the SysAid interface with the 'Service Desk settings' tab selected. The 'Due dates' sub-tab is active. A checkbox labeled 'Calculate due dates only on new incidents' is checked. Below it is a 'Save' button. A table lists existing due date rules:

Category	Subcategory	Third level category	Urgency	Priority	Company	Due period	
All Categories	All Subcategory	All third levels	All urgencies	All priorities	All	Days	Add
Basic Software	All Sub Categories	All Third Levels	All Urgencies	All Priorities	All Companies	8 Hours	Delete
User Workstation	All Sub Categories	All Third Levels	All Urgencies	All Priorities	All Companies	4 Hours	Delete

You can choose whether you wish SysAid to re-calculate the due date when changes occur, by un-ticking the box **Calculate due dates only on new incident** at the top of the due dates page.

Escalation Rules

When a certain condition is met, you might want a service request to *escalate*. Escalation describes the process by which an action is initiated. When a service request escalates, it performs a predefined action. An escalation rule, therefore, contains these two elements:

- A condition
- An action occurs when this condition is fulfilled.

Here is an example: SysAid administrator, Rachel, often forgets to solve service requests. If, within a month, she neglects to solve a service request assigned to her, you would like SysAid to automatically email her the message, “Answer your service request, Rachel!” The condition, therefore, is that a service request be open, a month old, and assigned to Rachel. The action is to email Rachel. This is the escalation rule. Now, whenever Rachel fails to solve a service request on time, the service request will escalate, and SysAid will automatically remind Rachel to address it. This was just one example. Various other conditions and actions are possible.

Note: Before creating an escalation rule, please make sure you know and define for which service requests and under what conditions this escalation rule is to be applied. If you fail to define this, the result might be that every single service request in SysAid will escalate automatically.

Create Escalation Rules

1. Go to **Help Desk Settings** → **Escalation Rules** tab. The **Escalation Rules** page lists the existing escalation rules
2. To add a new escalation rule, click on the **Create New Rule**. This will lead you to a form where you can create a new escalation rule.

59 Setting up an escalation rule

SysAid v5.0.00 Account: * User: ariel

Help Desk Settings

General Settings | Categories | Routing | Priorities | Due Dates | Alerts | **Escalation Rules** | Operating Times

Escalation Rule

To create an escalation rule, fill out the form below and click Add Rule.

Rule Name:

Escalate Service Requests of type:

Category:

Sub-Category:

Status:

Priority:

Assigned to:

Admin Group:

Requested by:

Company:

Expression Builder

☒ Escalate when more than days and hours have passed since

☐ Escalate days and hours before due time.

Actions to perform upon escalation

Notification

Notify

☐ Notify assigned administrator.

☐ Notify the End User who sent the Service Request.

Notification subject:

Notification body:

Re-assign Service Request to:

Change Status to:

Change Priority to:

Escalation Level:

Add Rule

- The form will let you compose various conditions and actions. Escalation rules can be based on a certain category, sub-category, third level category, status and priority.
- Click the **Add Rule** button at the bottom of the page.
- When composing messages (notification subject, notification body) to send upon escalation, you can use *tags*. To learn about tags, consult chapter 7 (7.1.3) of this manual. Escalation rules have "escalation priority". You will see an escalation priority dropdown menu. Certain

conditions for service requests, for instance, high-urgency requests two weeks past their due date, might merit escalation of a high priority. You can also create low-priority escalation rules for non-critical conditions: for example, service requests that are only a day past their due date. Escalated service requests can be increased in escalation with a different priority.

Note that SysAid allows to escalate the Service Level Agreement according to timers, and to add timers and other service request dates such as 'close date' and customized dates to the SLA.

Operating Times

An advanced feature of SysAid is the concept of *timers*, which can record time for service request operations. For example, a *Time to Respond* timer can record how long it took an administrator to begin handling the service request. The timers can be viewed in the service request list- you can add them to your list views.

1. To create timers, go to **Preferences → Help Desk Settings → Operating Times**.

60 Setting up Operating Times

2. When creating a timer, create an expression that defines the conditions for recording time. For example, create the expression “Status = New” to record how long a service request stays open.
3. Finally click the **Save** button.

SysAid offers a convenient Expression Builder, letting you build expressions based on SysAid fields. Building expressions is an advanced feature. If you require assistance in building an expression, contact us for support.

In the **Operating Times** screen, you can define the operating days/hours of the help desk. Holidays can be specifically excluded. Due dates, escalation, and timers will use these definitions.

8.2 Satisfaction Survey

The survey feature enables you to keep in touch with the needs of your end users. SysAiders can now issue a survey when closing a service request, in order to track and measure the satisfaction of your end users by the services of your helpdesk.

Enabling an end user satisfaction survey

In the General Settings page, under Preferences → Helpdesk Settings, you can also choose to add a satisfaction survey that will be sent to your end users once their service requests are answered. To enable this option, click the checkbox:

☒ Add a link to a survey for the end user regarding a closed Service Request.

Once the survey option is enabled, you should edit your survey.

Editing the satisfaction survey

To setup satisfaction survey:

1. Go to Preferences → Help Desk Settings → General Settings tab
2. Check the box: "Add a link to a survey for the end user regarding a closed Service Request".
3. A URL for the satisfaction survey will be added, in the email notification regarding the closure of a service request.
4. To edit the question, go to: Preferences → Customize → Translate tab.
5. In the **Translate** page, click to download the translate file. Save the file in an easily accessible location on your computer, for instance, on your desktop. To edit the Translate file as a text file, you may use Notepad or a similar program.
6. Open the file to edit it. To look for the survey question that now needs to be edited, press Ctrl + F and enter "survey.question=".

7. Edit the text for you question, save the file, and upload it via SysAid Translate page.
8. To edit the optional answers, go to: Preferences → Customize → Customized Lists tab
9. From the List drop down menu choose **Survey**.
10. Edit your questions, and click **save**.


Your survey results can be pulled as a report. There are three available reports regarding the survey system: satisfaction level by administrator, satisfaction level by category and satisfaction level by company.

8.3 Editing News

In SysAid you can update news for your administrators and end users. The news feature can be extremely useful to you when you have to announce some new and significant occurrence.

For example, if your network server is going to be down for a few hours during the week, you can announce this in the news and save calls from your co-workers saying that your server is down.

To edit your news:

1. From the SysAid home page click the **News** title at the left bottom of the page, under the main SysAid menu.
2. To create a new news item, click the **New** icon 

61 Editing News Item

SysAid v6.5.01 Account: cmdb User: ariel

Preferences SR quick access

Edit news

☐ Visible

Title: SysAid Demo

Description: Welcome to SysAid Online Demo!
This is a full installation of SysAid!
Please feel free to navigate thru the different menu items and modules.
You may submit Service Requests and perform other updates.
Some of the functions are limited and not available in this demo.
Enjoy!
The SysAid Team

Insert time: 06/22/2009 03:45

Show news to: All

Company: All

Group: All

☐ Urgent news

Save

3. Check the Visible box to render your news item visible.
4. Fill in the form with your news item title, the text of the item, and the time. In the news text field you may use html tags such as and
 to edit your text.
5. From the dropdown menu choose to show the news either to your administrators, to your end users, or to both.
6. If the news is urgent, tick the check box to mark the item as urgent news. The title of your news item will appear in red.
7. You can also sort the news items according to dates.

8. It is also possible to edit specific news for a specific group of users or only to a specific company. To customize this, under Preferences→ Edit News click the dropdown menus to choose the relevant group or company.

62 News Items in your SysAid Homepage



8.4 Email and SMS - Integration and Automatic Notifications.

Before being able to send and receive e-mail and SMS notifications from SysAid, the administrator must first provide SysAid with the outgoing and incoming email configurations of his/her organization.

In this chapter we will review how to:

- Configure SysAid for outgoing and incoming e-mails.
- Configure for SMS, if you have an SMS gateway account.

In the second part of this chapter we will explain how to set up to receive email and SMS notifications from SysAid.

Configure Email and SMS

Email

Go to Preferences → Integration → E-mail tab.

63 Setting up email integration

SysAid v6.5.01 Account: cmdb User: ariel

Preferences SR quick access

Integration

Email Text message LDAP Backup

Outgoing emails

SMTP host name newman.ilient-hq.local

SMTP port 25

Email address oded.moshe@ilient.co

User (optional for authentication)

Password (optional for authentication)

Encoding utf-8

Content type text/plain; charset=utf-8

☐ Enable SSL Secure

Incoming emails

☐ Enable incoming email integration.

☐ Enable SSL Secure

Warning! Do not use your own email address. Inputting your own email address will disable it. Please input an email account created especially for the email integration.

Protocol POP3

Mail Server Email address

User Password

Create a Service Request from incoming emails using the following parameters

Category Please select a category. Please select a sub-category. Select third level category

Outgoing Emails

SysAid can be set-up to send e-mail notifications to administrators or to administrator groups assigned to address specific service requests. Moreover when a person sends a response back to SysAid you can also receive an e-mail notification, so that you do not have to keep opening SysAid and checking for new responses. *Note:* Your user password is only needed if your SMTP requires authentication. If you do not provide SMTP information, SysAid will neither send any notification nor communicate with users concerning service requests; in effect, this mutes SysAid.

Administrator may want to send an email from within SysAid, or SysAid could generate and send automatic notifications concerning, for example escalation rules. Under **Preferences** → **Helpdesk Settings** → **General Settings** tab choose whom to notify (end user, administrator, admin group) and on what occasions.

SysAid is able to distinguish between messages and automatic notifications, and you can see them separately by clicking the button Show/Hide automatic messages in the helpdesk under the **Messages** tab.

Note that you can also customize an automatic SMS message to be sent according to your escalation rule. Go to **Preferences** → **Help Desk Settings** → **Escalation Rules** tab, and choose from the dropdown list **Notification Method** to send an email, a text message, or both.

64 Automatic SMS Message determined via an Escalation Rule

Notification

Notify

☐ Notify assigned administrator.

☐ Notify the end user who sent the Service Request.

Notification Method **SMS**

Notification subject

A service request #\${ID} has been escalated

Notification body

This is an automatic notification of an escalated service request in SysAid.
The service request was escalated based on the following rule: \${EscalationRuleName}.
The service request's details:

Incoming Email

SysAid can create a service request from an email alone, and thus accept service requests from non-registered end users. Also if an end user responds to an email sent to him/her from SysAid, this reply will be assigned to the service request and the status of the service request will be automatically changed. A notification can also be sent to your personal email.

The **E-mail Integration (incoming emails)** page is a duplicate of part of the **General Settings** page, therefore if you have completed the incoming email settings on the **General Settings** page there is no need to re-enter data here.

Email integration addresses two situations that can arise: if a new e-mail is sent, it can be turned into a service request, and as it is turned into a service request you specify here what category, subcategory and urgency it should be given. If an email contains a service request number in the subject field (For instance, Subject: #11,383 Printer not working) SysAid matches and attaches this reply to the service request; and then SysAid emails the administrator that the status has changed.

Table 5: Email integration

Item	Description
Enable incoming (POP3, IMAP) email integration POP3 Server: Email address: User: Password:	If you enable email integration, input the necessary data into the appropriate fields. The email received will open as a service request. SysAid extracts email from an email box given with POP3 or IMAP capability.
Create SR from new emails using the following parameters: Please select a category Please select a sub-category Please select urgency.	SysAid uses a predefined set of parameters to open the service request. These parameters are: Category subcategory and urgency; meaning a service request opened by email integration will always have the same category, subcategory and the same urgency. SysAid can identify the requested user by his email addressee. If not, he can be instructed to open one. Email integration gives you more flexibility when connecting with the IT department. The POP3 or IMAP email given should not be used for anything other than internal purposes. SysAid only supports POP3 and IMAP. The email address is the one you shall give to end users who want to send SR via this option. Service requests arriving by email will be assigned the following category and sub-category. The urgency that all service requests arriving by emails will be given is set here.
Send replies to assigned admin(s) and change status to:	When a service request is replied to, you will be sent notification and the status of that request in SysAid will be changed. Select the status from the dropdown menu.
Ignore emails with subject matter to (regular expression):	For those emails that have in their subject matter: (insert regular expression) for example: (Undelivered Mail Returned) all such emails will be ignored. This option is meant to protect your email account from Spam.

Item	Description
Forward ignore emails to:	Insert the username of the individual who should receive the ignored emails.

One of the advantages of email integration is that responses to emails sent from SysAid itself do not go to a personal email box but are centrally returned to SysAid, so that other team workers can answer service requests when the assigned administrators are off on holiday or off sick.

Configure SMS

1. Go to **Preferences** → **Integration** → **SMS** tab.
2. In order to use this option you should have a SMS gateway account.
One of the SMS gateways SysAid supports is clickatell (<http://www.clickatell.com>).
3. Complete all of the fields in the **SMS** integration page.

65 Setting up SMS Integration

The screenshot shows the SysAid web interface. On the left is a navigation menu with options like 'My Settings', 'User Management', 'Service Desk Settings', 'Remote Control Settings', 'Account Defaults', 'Customize', 'Integration' (highlighted), 'End User Portal', 'Asset Settings', 'CMDB Settings', 'Project Settings', 'Reminders', 'Edit news', 'Event Logs', 'Sub Types', 'Change Templates', 'Problem Templates', 'Service Desk Notifications', 'Chat Settings', 'Downloads', and 'About'. The main area is titled 'Integration' and has tabs for 'Email', 'Text message' (selected), 'LDAP', and 'Backup'. Under the 'Text message' tab, there are four input fields: 'Provider Class' (containing 'com.ilient.util.SMSCenterProvider'), 'Gateway ID' (containing '00'), 'User Name' (empty), and 'Password' (empty). Below these fields is a 'Sender ID' field (empty) and a 'Save' button.

4. Finally click **Save**.

Table 6: SMS Integration

Item	Description
Provider class:	Your SMS service provider
Gateway ID:	Given to you by your SMS provider
User Name:	Given to you by your SMS provider
Password:	Given to you by your SMS provider

In order to completely integrate SMS with SysAid, you should also make sure you enable the option in the **General Settings** page, as described below.
(**Preferences → Help Desk Settings → SMS**).

66 Enabling SMS Integration

SysAid v6.5.03 Account support User:rel

Preferences ▾ SR quick access ▾

Help Desk Settings

General Settings | Categories | Routing | Priorities | Due Dates | Alerts | Escalation Rules | Operating Times | Timers

☒ Email responsible when a Service Request changes.

☒ Email assigned group members when a Service Request changes.

☐ Send email notification to the submit user.

New Service Request default priority: Not assigned ▾

☐ SMS notification on new Service Request with priority >= First level ▾

Send SMS to:

☒ Email notification on new Service Request with priority >= Not assigned ▾

☒ Send Email notification to the administrator the service request is assigned to.

☒ Send Email notification to the group the service request is assigned to.

Send Email notification to:

☒ Send instance message to administrator regarding a new Service Request.

Email notification to End User when:

☒ Status changes to: New, Open, Closed, Active

☒ Add a link to a survey, which will be sent only with a close incident notification.

☐ Assign to changes.

☒ Notes are added.

☐ When closing SR, ask whether to add to Knowledge Base/ Self Service.

☒ Enable third level categories.

☒ Re-route Service Requests, based on routing rules, when the details of the request change.

☐ Display the automatic notifications in messages

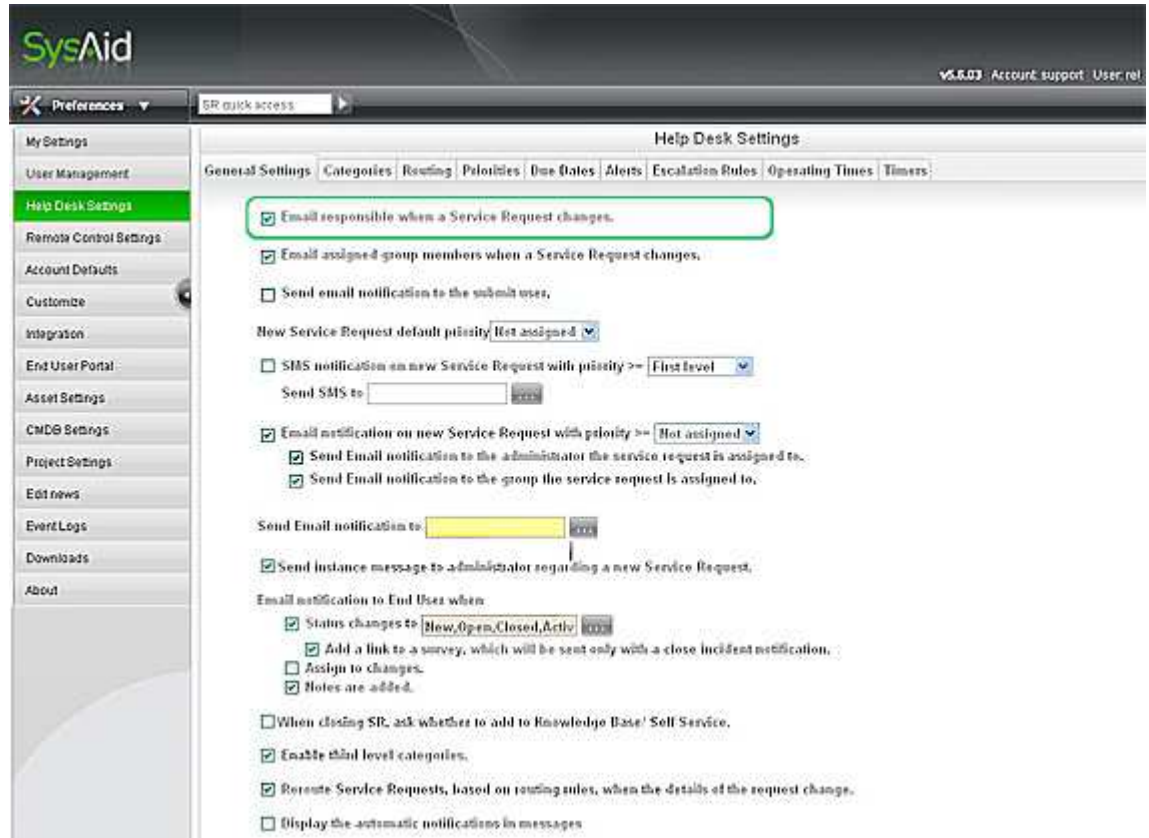
Setting up Automatic E-mail and SMS Notifications

SysAid can automatically notify users via e-mail or SMS when certain help desk events, such as new or changed service requests, occur.

Note that you can decide whether you wish your individual administrators or end users to receive automatic notifications regarding their service requests from SysAid, or not. To choose to turn off the automatic notifications, you may uncheck the relevant boxes in the service desk settings general page, or to add the automatic notifications field under **Preferences → My Settings**, and direct SysAid not to send the automatic notifications.

Go to the **General Settings** page (**Preferences → Help Desk Settings**)

67 General Settings page



When a **service request changes** you can instruct SysAid to **email** the responsible **administrator**. Enable the tick box in the option below:

When a service request changes you can also instruct SysAid to email notifications to a group of administrators.

☒ **Email responsible when a Service Request changes.**

For this to work, you should also set up this option in the **Routing** tab. The submit user of a certain service request, by default will not be sent an automatic notification when the SR is opened and when changes are made in it, unless you check the box "Send email notification to the submit user" under **Preferences → Helpdesk Settings → General Settings**.

Also, you can choose to send notifications according to the identity of the administrator/admin group the service request is assigned to.

- ☒ Send Email notification to the administrator the service request is assigned to.
- ☒ Send Email notification to the group the service request is assigned to.

In addition, you can be notified of high priority requests by e-mail or SMS. This will only take effect **on all** service requests if service requests are not routed automatically to an administrator/admin group. If routing has been set up, the routing rule will take effect first, then the system of notifications will start to operate on the remaining service requests. It will send you notification on those service request that are not captured by the routing rule and which met the priority you selected.

It is possible to set SysAid to send the automatic notifications in the language of the user who receives them rather than according to the language of the default SysAid settings, as defined under **Preferences → Account defaults**. You may enter your own custom translation variables, and translate them to your different languages and use them within the customized notifications.

In order to select the priority level from the dropdown box you should remember that: **1 = Urgent, is the highest number, with the highest level of alert and 5 the lowest number**. For example, selecting priority \geq Very High. If you will consult the coding menu Very high is 2, anything larger will include 1. So for all service requests coded 1 or 2 SysAid will issue a notification. **Insert the username of the individual** and not the SMS number or the actual email address.

☐ SMS notification on new Service Request with priority \geq Highest ▼
Send SMS to

☒ Email notification on new Service Request with priority \geq Low ▼

You have the option of sending an instant message to the administrator when a new service request is assigned to him/her.

- ☒ Send instance message to administrator regarding a new Service Request.

SysAid can send the end user a notification when either the status of a service request changes (for instance, an open SR is closed), the service request becomes assigned to another administrator, or notes are added by the administrator to the service request. The option in **General Settings** is:

Email notification to End User when

- ☒ Status changes.
- ☒ Assign to changes.
- ☒ Notes are added.

For detailed explanation of each option on the **General Settings** page see **Appendix 3**.

Integration with CTI

SysAid can be easily integrated with CTI (Computer Telephone Interface). The new process can be as follows: when a CTI system identifies the caller, SysAid can now open a service request according to ID number, or any other field you choose for identifying the caller. A caller can be identified automatically or requested to dial his/her ID number, and a new service request is opened, and the request user field is populated accordingly.

For example, if you identify the end user according to phone number, to verify that the details of the end user will automatically appear in SysAid (either in the SR or the phone call page) configure the following URL:

New Phone call

http://<your_server>:8080/SRPhone.jsp?id=0&autoUserField_phone=1234567



New Service Request

http://<your_server>:8080/SREdit.jsp?id=0&autoUserField_phone=1234567

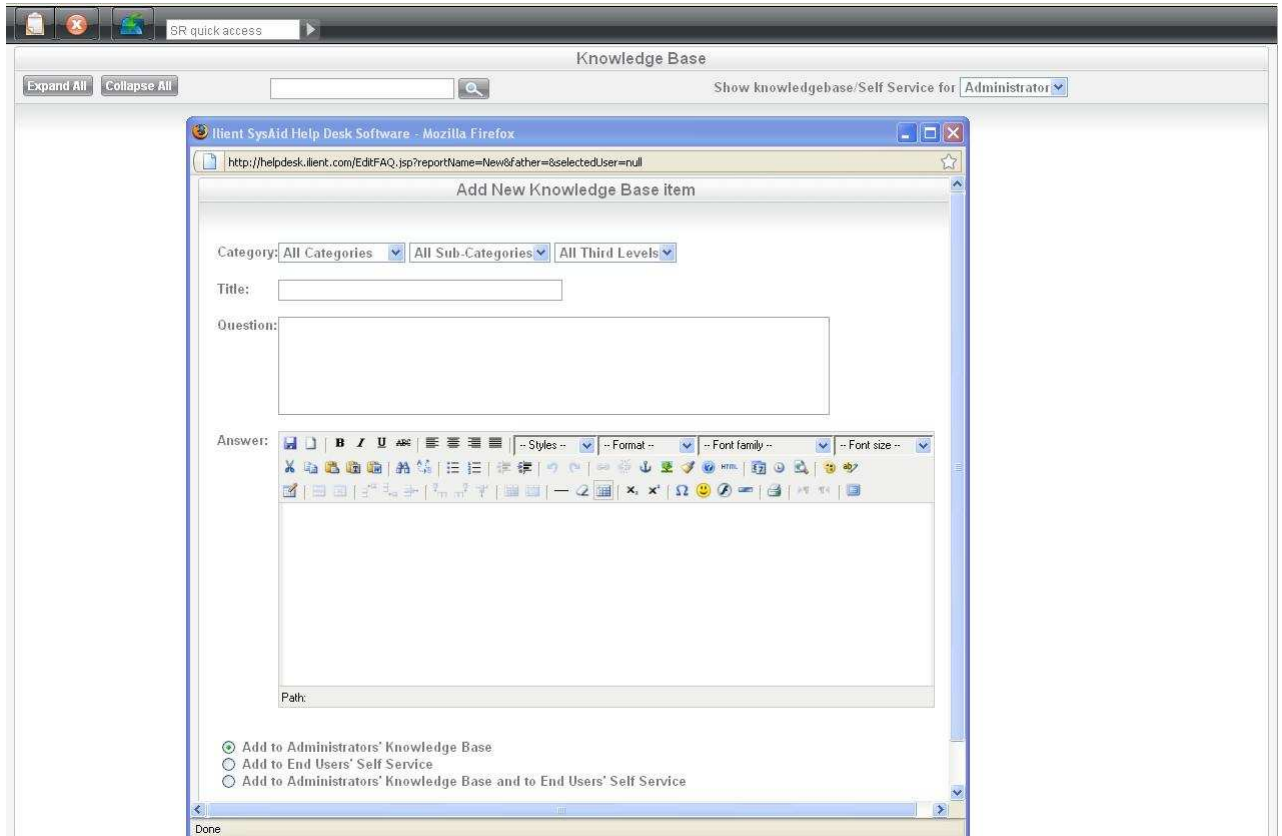
autoUserField_phone : in this example we used the phone field as a lookup field
- you can use any field name from the End user - see field names in the database manual under table named Sysaid_user.

8.5 Configure your Knowledgebase

SysAid enables the option of creating a knowledgebase for administrators, that includes important information for your IT team, and recurring service requests and their solutions.

To create a new knowledgebase item, go to:  **Helpdesk→Knowledgebase**
A new screen will open, with a list of your knowledgebase items. You may browse the list, or use the **Expand All** and **Collapse All** buttons to view the list the way you prefer. Click  **New** to create a new item.

68 Create a Knowledgebase Item



Insert a title, the question/problem and a solution. You may use the editing options to format your text.

Use the radio buttons to choose whether to keep your new item in the knowledgebase (for administrators), the Self Service Portal FAQs (for end users) or both.

Another option is to turn a service request immediately into a knowledgebase item or FAQ. The instructions for this are specified later in this chapter.

SysAid also allows you to add attachments (such as pictures or PDF files) to knowledgebase items. They will be added as links in the text. You can edit them by highlighting the text and clicking the link icon.

It is most recommended to take advantage of the SysAid Community when configuring your knowledgebase. If you are not yet registered, please go to **Preferences → My Settings → My community Settings** tab, fill in your details and click **Save**.


You may find many knowledgebase items used by IT experts all over the world, which are also relevant to your helpdesk. Visit the SysAid Knowledgebase forum at: <http://ilient.com/Sysforums/forums/show/58.page>


69 SysAid Community: Knowledgebase Sharing

Home » Forums » Feature Requests » SysAid Resources » Documentation » Support Hello ariel, Logout





























SysAid
IT Professional Community

Recent Topics » Hottest Topics » My Profile » My Bookmarks » Member Listing » Private Messages » Advanced Search

 **Knowledgebase Sharing - Share and download ready-made knowledge items**


Forum Index » Knowledgebase  Set all topics as read

Search this forum... 1 2 3 4 5 Go


Topic	Downloads	Answers	Author	Views	Last message
 How to upload and download Knowledgebase items into the SysAid community	6	10	Haim	1918	13/10/2008 10:02:22 Haim 
 Welcome to the Knowledgebase sharing forum	2	0	Saar	405	28/05/2008 08:45:47 Saar 
 Exception reading base attributes=;System.FormatException (Blackberry)	0	1	Makepeace	179	19/10/2008 08:33:03 Haim 
 title test	0	1	colynda	212	11/10/2008 17:19:54 Adam Racer 
 Office 2007 Freezing	0	0	colynda	324	09/10/2008 16:17:51 colynda 
 How to change MS Exchange Default Store Limits	0	0	Neil	647	07/08/2008 20:25:36 Neil 
 Remove Outlook AutoComplete Name	0	1	bobda	716	23/07/2008 11:26:40 Haim 
 KB-CS3-031 - Unable to get to the internet	1	10	CS3	1150	17/07/2008 11:39:16 Haim 
 Flush DNS	0	0	Inkaholic	523	17/07/2008 09:32:14 Inkaholic 
 Pantone Spot conversions not consistant	0	0	Inkaholic	304	17/07/2008 09:32:14 Inkaholic 
 Mac starts up with a blank desktop only	0	0	Inkaholic	335	17/07/2008 09:32:14 Inkaholic 
 Lost all desktop docs and folders	0	0	Inkaholic	367	17/07/2008 09:32:14 Inkaholic 
 Mac Safe Mode startup	0	0	Inkaholic	369	17/07/2008 09:32:14 Inkaholic 
 Win Mail.DAT attachments	0	0	Inkaholic	457	17/07/2008 09:32:14 Inkaholic 

To download an item, go in the community to **My Profile**, and fill in your Local SysAid Server URL in the form. You need to be registered in the SysAid community to be able to download an item. If you are not yet registered, please go to **Preferences → My Settings → My community Settings** tab, fill in your details and click **Save**.

To import Knowledgebase items from the SysAid community, click the icon

“Download directly to my SysAid”  in the community. The item will be imported to your local server.

You can also take part in the SysAid community by uploading you own

knowledgebase items or FAQs, for the use of other IT experts. Click the  **Upload** button to upload your own data.

8.6 Configure the End User Portal


In SysAid there are three types of users:

- ➡ End users, who seek help desk support.
- ➡ Administrators, who manage the organization's help desk, assets, purge database and manage projects.
- ➡ Managers, who overview the organization, generate, run and schedule reports.

When managers and administrators log into SysAid, they see various screens and functionalities. When end users log into SysAid, however, their options are more limited. Administrators can configure what end users will see when logging in. The **End User Portal** is an optional screen for end users. It offers the end user the opportunity to:

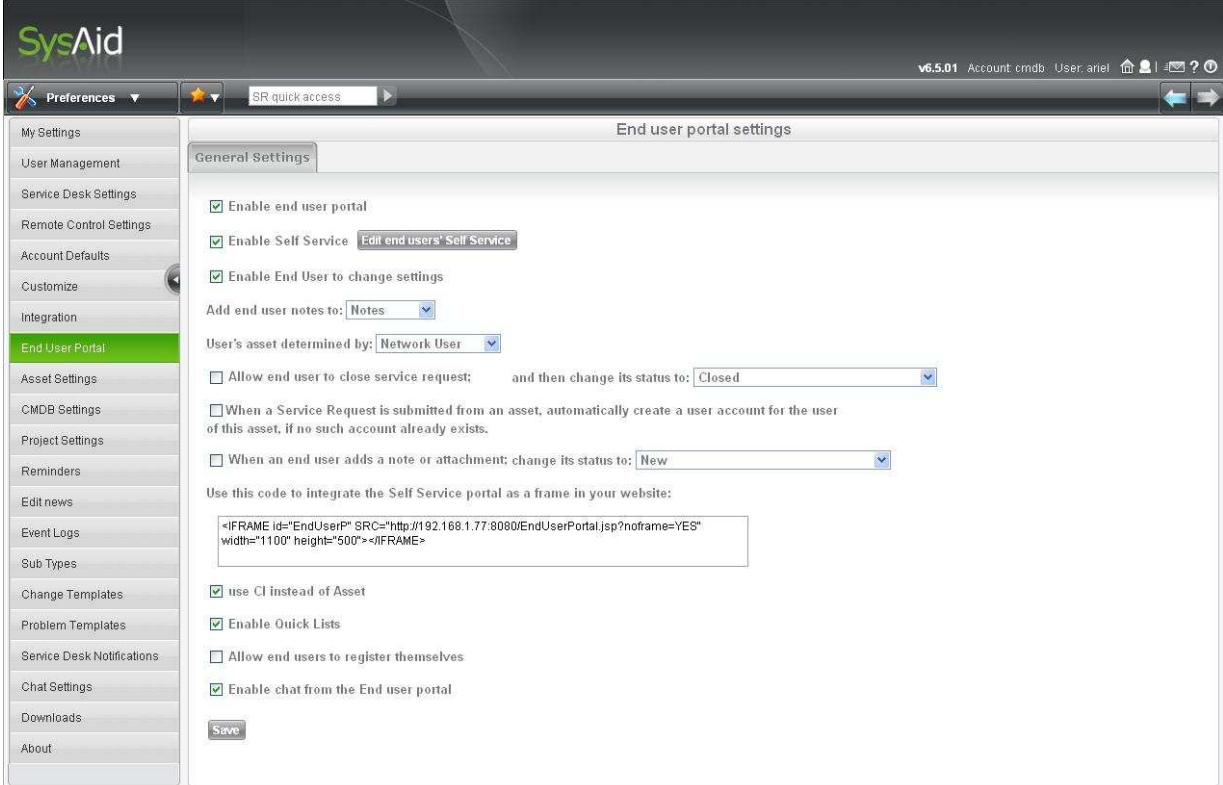
- Submit service requests
- View an FAQ maintained by SysAid administrators
- View details of their submitted service requests (and of other requests, in case they are supervisors)
- Add notes to their submitted service requests
- Change their settings, such as name, password, etc.
- Chat with support team members

The End User Portal editing function appears under Preferences in your SysAid sidebar menu (click on Preferences to see it). To change the End User Portal

settings, click on the End User Portal link under Preferences. To view the End User Portal as an end user, however, click the icon of a figure in the upper right corner of your SysAid application screen .

Here are the administrators' options for configuring the End User Portal.

70 End User Portal Settings



The screenshot shows the SysAid interface with the 'End User Portal' settings page. The left sidebar lists various settings categories, with 'End User Portal' selected. The main content area is titled 'End user portal settings' and contains the following options:

- ☒ Enable end user portal
- ☒ Enable Self Service [Edit end users' Self Service](#)
- ☒ Enable End User to change settings
- Add end user notes to:
- User's asset determined by:
- ☐ Allow end user to close service request; and then change its status to:
- ☐ When a Service Request is submitted from an asset, automatically create a user account for the user of this asset, if no such account already exists.
- ☐ When an end user adds a note or attachment; change its status to:
- Use this code to integrate the Self Service portal as a frame in your website:


```
<IFRAME id="EndUserP" SRC="http://192.168.1.77:8080/EndUserPortal.jsp?noframe=YES" width="1100" height="500"></IFRAME>
```
- ☒ use CI instead of Asset
- ☒ Enable Quick Lists
- ☐ Allow end users to register themselves
- ☒ Enable chat from the End user portal
- [Save](#)

The first checkbox, **Enable End User Portal**, at the top of the page, lets you enable or disable the **End User Portal**. When the **End User Portal** is disabled, end users will see only a screen for submitting service requests. They would have other options only when the **End User Portal** is enabled.

It is also possible to check the box **use CI instead of Asset** so that End Users will be displayed with CI-s instead of assets and they will have to choose a CI that belongs to them when submitting a service request.

The second checkbox, **Enable Self Service (FAQ)** lets administrators enable end users' self service. Optionally, you can create a self service screen for end users. This lets end users find solutions to common problems themselves,

sparing administrators from answering recurring questions. End users can view the self service FAQ only via the **End User Portal**, so to enable the self service, the **End User Portal** must be enabled, as well.

The third option, **Enable Settings**, determines whether to let end users change their settings. This option, too, is available to end users only within the **End User Portal**.

End users can add notes to their old service requests using the following radio buttons:

- Add end user notes to
- Notes Description

You can decide where these notes will be added to: The service request notes field or the service request description field.

You can configure SysAid to automatically notify the end user when a note is added to his/her Service Request. Under **Preferences → Helpdesk Settings**, tick the box "Email notification to end user when notes are added".

Under **Preferences → End User Portal Settings**, you can also copy the code for adding the SysAid Self Service Portal as an iframe to your own website. Simply paste this code at the place you wish to see SysAid End User Portal in your own website. All you have to do is fit the size of the frame to your website.

You may save yourself the time of registering end users into the End User Portal, by allowing them to do so independently. All you need to do is check the box "Allow End Users to register themselves" in this page. This will create a link that End Users will be able to use when entering the End User Portal, to register themselves to it.

71 Independent Registering into the End User Portal



Welcome to SysAid!

Please enter your login information

User Name:

Password:

[Forgot your password?](#)

[If you do not yet have a user, please click here to signup](#)

Help Desk software by ilient

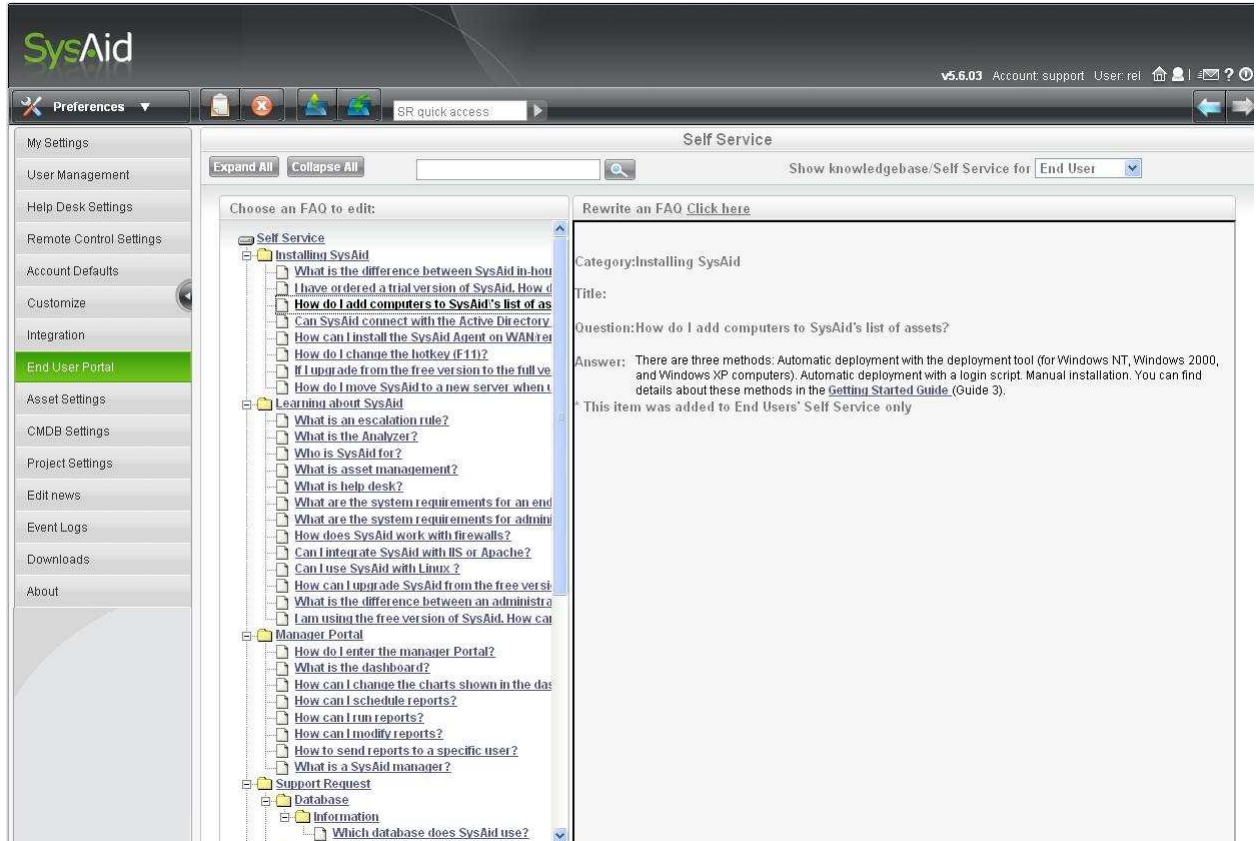
You can also enable chat between administrators.

Another option here is to edit the quicklist for end users. The quicklist offers your end user a template for submitting their service requests in common issues, and saves them time and effort when submitting their requests. SysAid will automatically fill out the request details for the end user, in common issues. To learn more about setting your quicklists, please check **chapter 7: Advanced Configurations** in this guide.

You can edit the self service by clicking on the **Edit End Users Self Service** link. You will reach a screen where you can create and edit FAQ items. End users will see these items when logging into the portal.

Click on **Add New FAQ** button. You will reach a form for adding an FAQ item. Select a category, input the common question, and input the solution. In the self service screen, the FAQs will be sorted by category. The FAQs you add will be listed in the **Edit End Users Self Service** screen. Click **Modify** next to an FAQ item to edit it. Click **Delete** to remove an entry. If **Self Service** is enabled, the End User will see this FAQ. When you have finished configuring the **End User Portal**, click **Save**.

72 Editing the FAQ page



You can also configure what fields an end user will see when viewing his or her old service requests. For example, perhaps you want end users to see the status of their old service requests, but not their priority. The fields the end user can see are known as the EndUser View. You can learn about customizing views in chapter 7 .

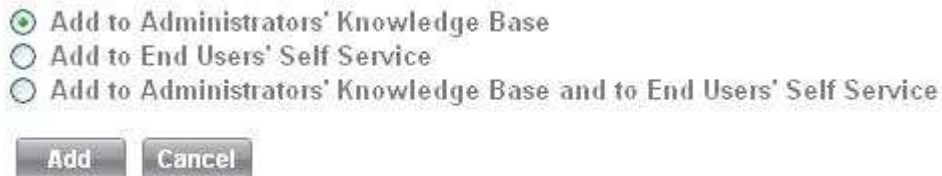
Turning a Service Request into a FAQ/KB item

You can save time by creating an FAQ for end users or a knowledgebase item for administrators directly from a service request. This feature is most useful when you receive multiple service requests regarding the same problems.

To turn such a repeating SR into a FAQ or into a knowledgebase item, click the link *Add to knowledgebase* in the SR **General Details** page. A popup screen with various designing options, will open, and the relevant fields of the SR already

appear: category, title, description, and solution. You can also design the appearance of the text.

Choose from the radio buttons that appear at the bottom of the popup screen whether you wish to create a new FAQ, a new knowledgebase item, or both.



☒ Add to Administrators' Knowledge Base
☐ Add to End Users' Self Service
☐ Add to Administrators' Knowledge Base and to End Users' Self Service

Add **Cancel**

Note that when you search for a KB item from within a specific service request, SysAid will focus its search for KB items with the same categories as the service request.



Supervisors

The full edition of SysAid includes a feature that allows nominating particular end users as their department or their company's supervisors. To learn more about the SysAid Full edition, please follow this link: <http://ilient.com/fullversion.htm> .

The supervisor will be able to see all service requests of his/her supervised end users. Needless to say, nominating end users as supervisors can offer a great



advantage in improving your workflow and in reducing the workload on administrators.


To determine that a certain end user will be a **company supervisor**, you have to:

1. First set at least one company in the dropdown menu of companies (**Preferences→ User Management→ Companies**)
2. Then attribute end users to a company (**Preferences→ User Management→ End User Manager→** click a row entry→ **General Details**). In case the **Company** field does not appear in the **General Details** form, click the **Customize** icon  and in the popup screen add "company" to the visible fields. The process of linking end user to companies is further elaborated in **Chapter 3 Setting up Users** (page 24) of this guide.
3. Under the **General Details** tab of that end user you wish to nominate as a supervisor, click the **Customize** icon , and add "Is supervisor" to the list of visible fields.
4. Choose from the dropdown menu to make this end user into a company supervisor.

To determine that a certain end user will be a **Department supervisor**, you have to:

1. First you need to add a menu which includes at least one department. Go to (**Preferences→ Customize→Customize Lists**).

2. Choose "Department" from the dropdown menu. In the caption box add at least one name for a department, and add a key number. You can add any sequence of numbers to the list of departments, as long as you do not repeat the same key number for different departments. Click **Add** to add a new department to the menu. Finally, click **Save**.
3. Then attribute end users to a department (**Preferences**→ **User Management**→ **End User Manager**→ click a row entry→ **General Details**). In the **General Details** form, click the **Customize** icon  and in the popup screen add "department" to the visible fields, with the arrow button.
4. Under the **General Details** tab of that end user you wish to nominate as a supervisor, click the **Customize** icon , and add "Is supervisor" to the list of visible fields. Choose from the dropdown menu to make this end user into a department supervisor.

You can also add the "Is supervisor" to the visible field using the **Customize**  icon in the **End User Manager** page. Thus, you will be able to immediately see your supervisors.

Asset User determined by:

This performs a check when the end user initially logs into his/her computer using his/her username and password and matches this later on to the login information given in SysAid.

If you are not sure what the options mean and the effect they can have, keep the default setting (Network User) as they are.

The three options are:

Network User - If you have a standard network that matches username and password for Windows authentication, select this option. This is the default setting.

Domain and User - This option is selected if you have more than one active directory (more than one LDAP), and your users login using domain name/username.

Asset Owner - This option can link one person **only** to an asset. This option will cause a service request to be based on an asset owner.

The advantage of this option, for instance, is for companies that are external IT service providers. The clients of such a company do not have access to the active directory of that company and therefore a contact person is required for a particular asset. This option lets such companies have the contact information of their clients. With this option the asset binds to a specific user and creates a contact person.

If you select **Asset Owner** you should ensure you link the asset to an individual. To do this:

1. Go to **Asset management** → **Asset List**. Enable the check box of the asset in question, and then double click on the asset to open the **Information** page.
2. Go to the **Belongs to** field, and link the right person to the asset. Click **Ok** to finish.

3. Finally to set this up for the end user, go to Preferences → End User Portal → Asset user determined by, select Asset Owner. Finally click Save.

73 Information page for an asset

The screenshot shows the SysAid web interface for an asset named 'FIRAS' (ID: 00-12-3F-50-BB-F5). The 'Information' tab is active, displaying the following details:

- Name:** FIRAS
- Type:** Workstation
- Group:** [Dropdown menu]
- Company:** Select Company
- Catalog number:** OptiPlex GX520 Dell Inc. Workstation
- Description:** [Text field]
- Belongs to:** none [Change button]
- Users:** [Text field] [Browse button]
- Serial:** DV4DS1J
- Model:** OptiPlex GX520
- Manufacturer:** Dell Inc.
- Operating System:** Windows XP Professional [5.1.2600]
- CPU:** 2 x Intel Corporation Pentium 4 3.0 Ghz
- Memory:** Physical: 1014 Mb, Page file: 2441 Mb
- Display:** Intel(R) 82945G Express Chipset Family adapter, Plug and Play Monitor monitor.
- Storage:** Total capacity: 80 Gb in 1 devices
- Network:** Host FIRAS@ilient-hq.local, AdapterBroadcom NetXtreme 57xx Gigabit Controller #2 - Packet Scheduler Miniport, IP Address 192.168.1.14

Finally there is an option for individuals to submit service requests even though they are not end users of SysAid. To activate this option, go to **Preferences** → **End User Portal** and from the dropdown menu choose the **Asset Owner** option. Then, enable the check box:

When a service request is submitted from an asset, automatically create a user account for that asset's user, if no such account already exists.

Related Guides and Reading

Guide 7: End User Manual

http://www.ilient.com/download/end_user_manual.PDF

Chapter 9 Reports in the Analyzer

SysAid offers a reporting function via the **Analyzer** portal.

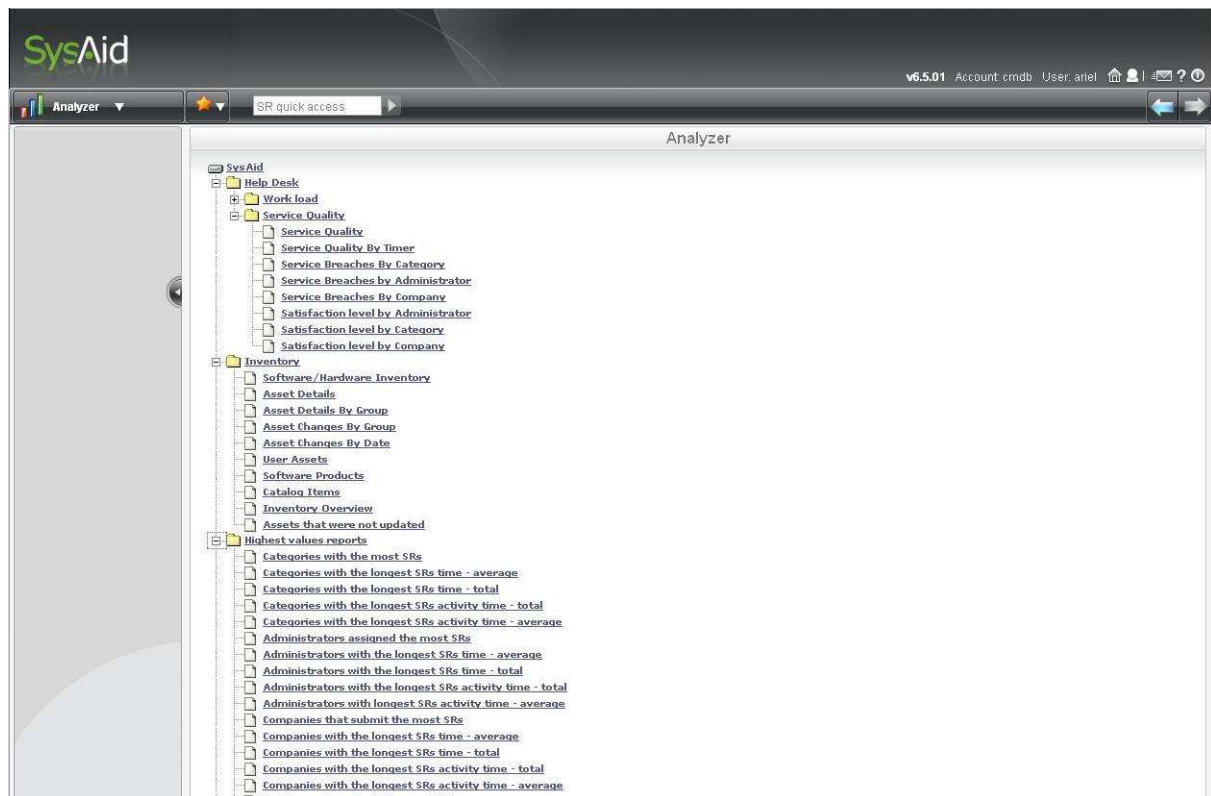
SysAid provides various standard reports, which can be customized by utilizing the various dropdown menus. These reports are the same as the reports available in the **Manager Dashboard**. In the Analyzer, however, the options are much more limited. If you have the full edition of SysAid you can run, modify, send, schedule and perform more actions on these reports. To learn more about the SysAid Full edition, please follow this link:

<http://ilient.com/fullversion.htm> . Please read chapter 11 in this guide to learn more about the reports in The **Manager Dashboard**.

The Analyzer stores reports in three folders:

- **Help Desk** (containing two subfolders **Work Load** and **Service Quality**).
- **Inventory**
- **Highest Values Reports**

74 Analyzer



Access a report by clicking on the plus + sign next to the yellow folder, to open its contents. Listed in the table below are the reports that can be generated in the Analyzer.

Table 7: Report contents in the Analyzer file tree

Folder	Report Name	Content of report
Help Desk/Workload		
	Active Requests	Number of active service requests- broken down by category, company asset group, group, admin, end user, priority or urgency. Data displayed in - Table.
	Opened/Closed Requests per Period	Number of opened and closed service requests during a specific period (day, week or month). Data displayed in - Table & line graph.
	Opened/Closed Requests per category	Number of opened and closed service requests for a selected category. Data displayed in - Table & bar

		chart.
	Opened/Closed Requests per company	Number of opened and closed requests by company. Data displayed in - Table & bar chart.
	Opened/Closed Requests per administrator	Number of opened and closed service requests by administrator. Data displayed in - Table & bar chart.
	Opened/Closed Requests per admin group	Number of opened and closed service requests by administrator group. Data displayed in - Table & bar chart.
	Opened/Closed Requests per priority/urgency	Number of opened and closed service requests by priority or urgency. Data displayed in Table.
	Help Desk Activity Summary	Provides service request totals. You can choose from a group variable and sub-group variable in your report. Data displayed in Table.
	Activities By Administrator	Lists activity per service request number. Includes date worked on, title, description and length of time. Also includes service request type. Data displayed in Table.
	Workload by Administrator	Lists number of service requests, activities and times by administrator. Data displayed in Table.
	Service Requests per third category	Summarized number of service requests, specified for the third level category.
Service Quality		
	Service Quality	Number of service requests opened, and the mean time to repair (MTTR) is the default setting. Data displayed in table listing.
	Service Quality By Timer	Summarizes the number of service requests, date service request opened and average time taken to repair in days. Data displayed in table.
You must complete the field: Threshold in hours		
	Service Breaches By Category	Breaches are broken-down by category. Mandatory - specify the threshold in hrs. Average time to repair (hr, mins) -listed per category. Data displayed in - table and bar chart.
	Service Breaches by Administrator	Calculates "time to repair".

		Mandatory - specify the threshold in hrs. The report then calculates the number of breaches by admin and the average time. Displays data in table and bar chart.
	Service Breaches by Company	Breaches are broken down by company. Mandatory - specify the threshold in hrs. The average time to repair per company is listed (hr, mins). Displays data in table and bar chart.
Inventory		
	Software/Hardware Inventory	Lists software and hardware. You have the option to enable: Show assets details . This gives a further breakdown. Data displayed in Table
	Asset Details	All the details of one asset you select are provided. Data displayed in Table.
	Asset changes by group	This report lists those changes that have taken place for an asset during the dates specified. It lists the changes according to asset group. Data displayed in Table.
	User Assets	Select a user, all the assets for that user will be listed. Data displayed in Table.
	Software Products	Software products for a company or all companies are listed. You can also choose to show an assets details. Data displayed in Table.
	Catalog Items	Lists the contents of your catalog plus provides a count of the number of assets you have that are listed in your catalog. Data displayed in: Table.
	Inventory Overview	Provides overview of inventory. Range of graphics.
	Assets that were not updated	Lists assets that were not updated, including their details, hardware, software, user, etc. Data displayed in Table.
	Assets with the most Service Requests	This report presents the assets from which the highest number of service requests were sent, during the specified period.
Highest Values Reports		
The default is five listed items for each highest values report. However, you can easily customize the number of reported items. To learn how to do so, please consult chapter 11: The Manager Dashboard in this guide.		
	Categories with the most SRs	Lists the top 5 categories which contain the most service requests.
	Categories with the longest SRs time-	Lists the top 5 categories with

	average	service requests that took the longest time to solve, in average.
	Categories with the longest SRs time - total	Lists the top 5 categories with service requests that took the longest total time to solve.
	Categories with the longest SRs activity time - total	Lists the top 5 categories with service requests of which the total activity time is the longest.
	Categories with the longest SRs activity time - average	Lists the top 5 categories with service requests of which the average activity time is the longest.
	Administrators assigned the most SRs	A list of the top 5 administrators who are assigned the most service requests.
	Administrators with the longest SRs time - average	A list of the top 5 administrators who took the longest average time to solve their service requests.
	Administrators with the longest SRs time - total	A list of the top 5 administrators who took the longest total time to solve the service requests assigned to them.
	Administrators with the longest SRs activity time - total	A list of the top 5 administrators who invested the longest total activity time to solve the service requests assigned to them.
	Administrators with longest SRs activity time - average	A list of the top 5 administrators who invested the longest activity time in average to solve the service requests assigned to them.
	Companies that submit the most SRs	A list of the top 5 companies that submitted the most service requests.
	Companies with the longest SRs time - average	The top 5 companies whose service requests took the longest time to solve, in average.
	Companies with the longest SRs time - total	The top 5 companies whose service requests took the longest total time to solve.
	Companies with the longest SRs activity time - total	The top 5 companies whose service requests took the longest activity time in total.
	Companies with the longest SRs activity time - average	The top 5 companies whose service requests took the longest activity time in average.
	End Users who submit the most SRs	A list of the top 5 end users in terms of the submission of service requests.
	End Users with the longest SRs time - average	The top 5 end users whose service requests took the longest average time to solve
	End Users with the longest SRs time - total	The top 5 end users whose service requests took the longest total time to solve
	End Users with the longest SRs activity time - total	The top 5 end users whose service requests involved the longest total

		activity time
	End Users with the longest SRs activity time - average	The top 5 end users whose service requests involved the longest average activity time
Projects and Tasks Reports		
	Tasks-Projects-Activities-overview	This report provides an overview of all the activities in projects, according to different tasks.
	Task activities by administrator	You can see the different activities according to administrators.
	Tasks per User	Different tasks presented according to the responsible user.
	Tasks per statuses	Presents the tasks according to their statuses
	Tasks per project	Presents the tasks according to the projects they belong to.

Clicking the name of a report will open a new page, which contains a form that helps you to set the parameters in the report.

75 Active Requests page

Some of the parameters that you can set in these forms are: Category, Sub category, company, asset grouping, custom filter, output format, date range, and number of records.

Select the specific parameters. Click the **Submit** button.

For more information about setting the parameters of the report, please consult

The Manager Dashboard chapter in this guide.

Chapter 10 Project and Task Management

The *Project and Task Management* tool (Tasks/Projects) is available in the full edition of SysAid and in the full edition 30-day trial. To learn more about SysAid Full edition, please follow this link: <http://ilient.com/fullversion.htm> . *The Free Edition does not have this module.*

This feature, has been designed for Projects and Tasks management, and allows members of staff to:

- ➡ Track progress
- ➡ Track resource usage (personnel)
- ➡ Allocate time wisely
- ➡ Keep record of all activities
- ➡ Store relevant documentation
- ➡ Review and record all versions of the project (A version numbering method provides the user with a record of changes made to the project over time).

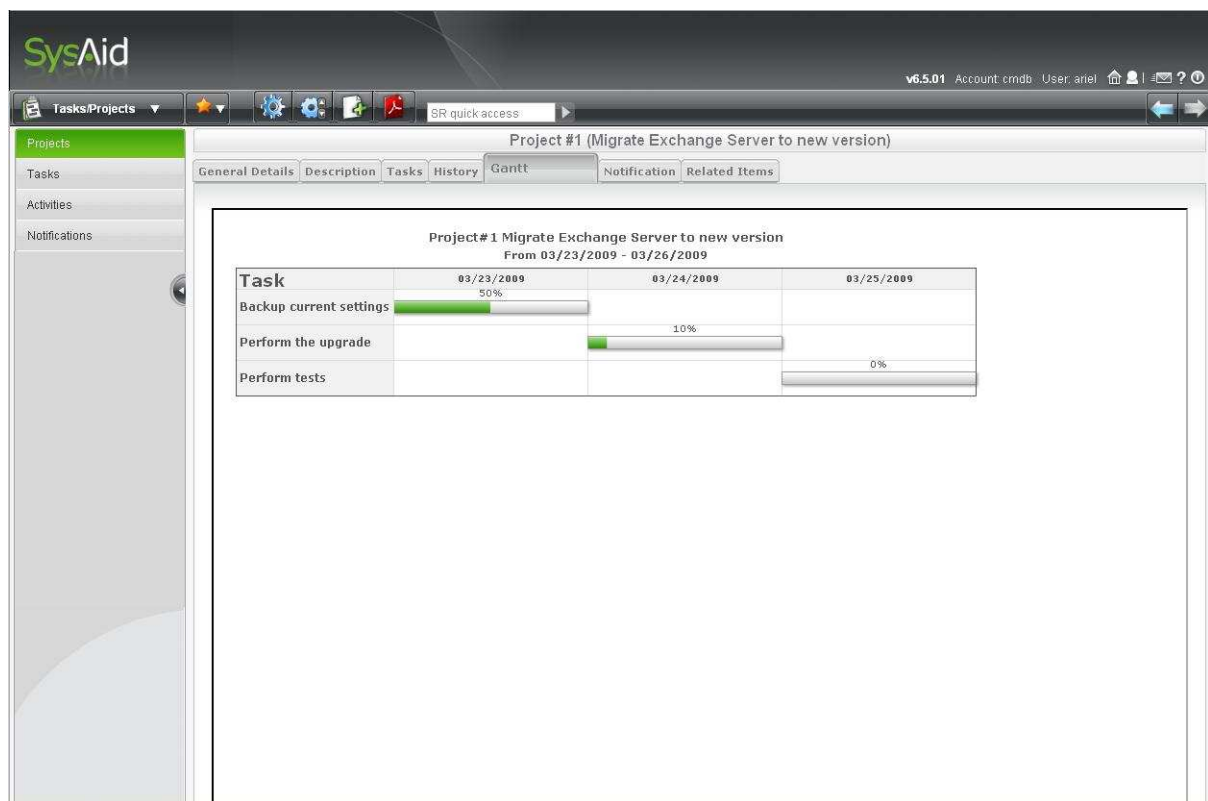
With **Project and Task Management**, one can focus on improving time management, track expended resources and oversee the successful completion of project deliverables. User-specific customization is available in **Project and Task Management**. The **Project and Task Management** interface allows you to manage multiple-projects, add file attachments and input detailed information on project milestones and on personnel.

Working in the task interface you can easily build your project step by step. By detailing all necessary tasks, you come closer to fulfilling the goals of your project. In addition, all service requests associated with a project can be conveniently reviewed.

The SysAid **Projects and Tasks** module is strongly integrated with the **Helpdesk** module. You can attach tasks to service requests for better control and follow-up capabilities, and you can determine that tasks will automatically open new service requests, to improve your service quality.

The **Project and Task Management** module is suitable for small as well as for large scale projects.

76 Gantt Chart displaying the grouping of tasks per category



See the full Projects and Tasks Guide:

<http://www.ilient.com/down/Project and Task Management.pdf>

Chapter 11 SysAid Manager Dashboard

The **Manager Dashboard** is a module in SysAid, which provides a full suite of reporting features. In the **Manager Dashboard** the user can take advantage of standard reporting features or customize entirely his/her own reports.

Here are some of the advantages SysAid Manager Dashboard can offer:

- ➡ An immediate and customizable overview of the state of affairs in your organization
- ➡ A wide choice of reports that can be scheduled, customized, and sent to different users
- ➡ Various possibilities to modify reports according to your specific needs, or to create entirely new reports
- ➡ An immediate and customizable graphic Dashboard overview of the state of affairs in your organization.

The **Manager Dashboard** tool is available in the full edition of SysAid no. 4.0.1 and up. To learn more about SysAid Full edition, please follow this link: <http://ilient.com/fullversion.htm> . Note that *the Free Edition does not include this module.*

77 SysAid Manager dashboard



Please see the full Manager Dashboard Guide for full details

<http://www.ilient.com/down/Manager Dashboard Guide.pdf>

Chaper 12: IT Benchmarks

The IT Benchmark is a dynamic **measurement tool** that translates the raw data of your IT activities into meaningful facts and numbers. As an innovative feature indispensable to the analysis of your IT department's performance, the IT Benchmark is a landmark module **completely unique to SysAid**.

With the IT Benchmark, you can compare your current IT statistics with data from previous months and years. Furthermore, you can compare your department's statistics with thousands of other IT departments worldwide.

These statistics lend themselves to immediate analysis. Gaining a greater and ultimately global perspective of your department's performance helps you **assess your** department's strengths within a truly relevant context.

78 IT Benchmarks page

SR quick access

IT Benchmarks

Share	Measurement	Monthly data		Yearly data		
		Current Month	Last Month	Current Year	Last Year	
<input checked="" type="checkbox"/>	Daily opened / closed ratio	1.0	0	1.0	0	
<input checked="" type="checkbox"/>	Average SR-s closed per Admin.	14.0	0	14.0	0	
<input checked="" type="checkbox"/>	Percent of SR-s closed without re-assigning	1.0	0	1.0	0	
<input checked="" type="checkbox"/>	Percent of SR-s opened via the end user portal	0	0	0	0	
<input checked="" type="checkbox"/>	Percent of SR-s opened via incoming Email	0	0	0	0	
<input checked="" type="checkbox"/>	Average resolution time of SR-s	33266.79	0	33266.79	0	
<input checked="" type="checkbox"/>	Percent of incidents related to user workstations	1.0	0	1.0	0	
<input checked="" type="checkbox"/>	Percent of incidents related to Printers	1.0	0	1.0	0	
<input checked="" type="checkbox"/>	Percent of incidents related to Servers	1.0	0	1.0	0	
<input checked="" type="checkbox"/>	End user Vs Admins ratio	34.0	34.0	34.0	34.0	
<input checked="" type="checkbox"/>	Percent of escalated SR-s	0	0	0	0	

Worldwide SysAiders distribution of measurement

Note: A ratio between all Service requests (SR type=Incident) that have been closed during the period Vs the distinct number of Admins that are assigned to the closed requests. If you have certain Admins that you don't want to be included in the count, you can exclude them using the filter builder.
[Click here for more information about this measurement.](#)

☐ I agree

By participating in SysAid IT Benchmark, you agree to share statistics about your helpdesk's activity to compare your IT performance with that of other SysAiders worldwide. This information is collected for statistical purposes only and will be aggregated with other SysAid data to generate worldwide IT benchmarks. No specific information about your organization will be reflected in the statistics. After you click accept, you may uncheck specific measurements at any time to specify which information you would like to contribute.

Your industry

Chapter 13 SysAid ITIL Package

The *SysAid ITIL Package* is available in the full edition of SysAid and in the full edition 30-day trial. To learn more about SysAid Full edition, please follow this link: <http://ilient.com/fullversion.htm> . *The Free Edition does not have this package.*

What is ITIL, and how can it help me?

The Information Technology Infrastructure Library (ITIL), is an international framework of best practices for IT management and service quality, released by the UK Office of Government Commerce (formerly CCTA).

With SysAid ITIL package, you will continue to experience the same fully customizable and intuitive SysAid interface, and smooth integration with your existing SysAid modules. All ITIL modules come with pre-defined templates or basic start-up tools to help you get you up and running, so you can enjoy ITIL's wide-reaching and comprehensive range of proven management solutions in next to no time.

ITIL Problem Management

In ITIL, Problem Management refers to the process of analyzing root incident causes and proactively handling problem areas to minimize incident recurrence and business impact (as opposed to fire-fighting).

In a logical extension of the SysAid Helpdesk, SysAid's ITIL Problem Management offers a wider approach to managing SR Incidents, including the ability to group isolated SRs into related problem themes, and a knowledgebase of known errors and work-around methods. The module is designed to help you improve your IT service levels and proactively eradicate root problem causes in your organization.

ITIL Change Management

ITIL literature also provides a best practice process framework and approval workflow for implementing effective organizational change and minimizing the risk of business exposure and service disruption.

SysAid's ITIL Change Management holds an unlimited number of change processes and allows you to customize options to suit any change scenario in your organization. Automate workflow approval processes with ITIL's proven chain of approval to help you manage and control your change activities. Apply pre-defined change templates, perform multi-level risk assessments and authorizations with a full audit trail, set secure notes, tasks and permissions for multiple stakeholders and more.

79 Change Management Process.

The screenshot displays the SysAid web interface for ITIL Change Management. The top navigation bar includes the SysAid logo, version 'v6.0.01', and user information 'Account: cmdb User: ariel'. A sidebar on the left lists various service desk functions like Incidents, Change Requests, and Problems. The main content area is titled 'Change(Advanced SysAid ITIL Change) #7' and features a workflow bar with steps: Change Details, Analyze (current), CAB Approve, Implement, Release, Review, Close, and History. Below the workflow bar, there are sections for 'Instructions' and 'Notes' with text input fields. A secondary workflow bar shows steps: CMDB, Resource Assessment, Proposed Dates, Budget Data, and Risk Assessment (current). The 'Risk Assessment' section contains a dropdown for 'Assigned to' (set to 'ariel - Portuguese Ariel'), an 'Instructions' field, and several dropdown menus for 'Complexity', 'Impact', and 'Urgency'. There are also input fields for 'Expected Downtime Start' and 'Expected Downtime End', a 'Title' field with a placeholder for back out plans, and an 'Attachments' section with an 'Add' button.

The SysAid CMDB module helps your organization understand the relationships between components and track their configuration.

CMDB are the initials for Configuration Management Data Base. The CMDB is a repository of information related to all the components of an information system.

In fact, the CMDB is a data base that keeps information about all your network assets, software products and catalog items, as well as all the information about the relations between them.

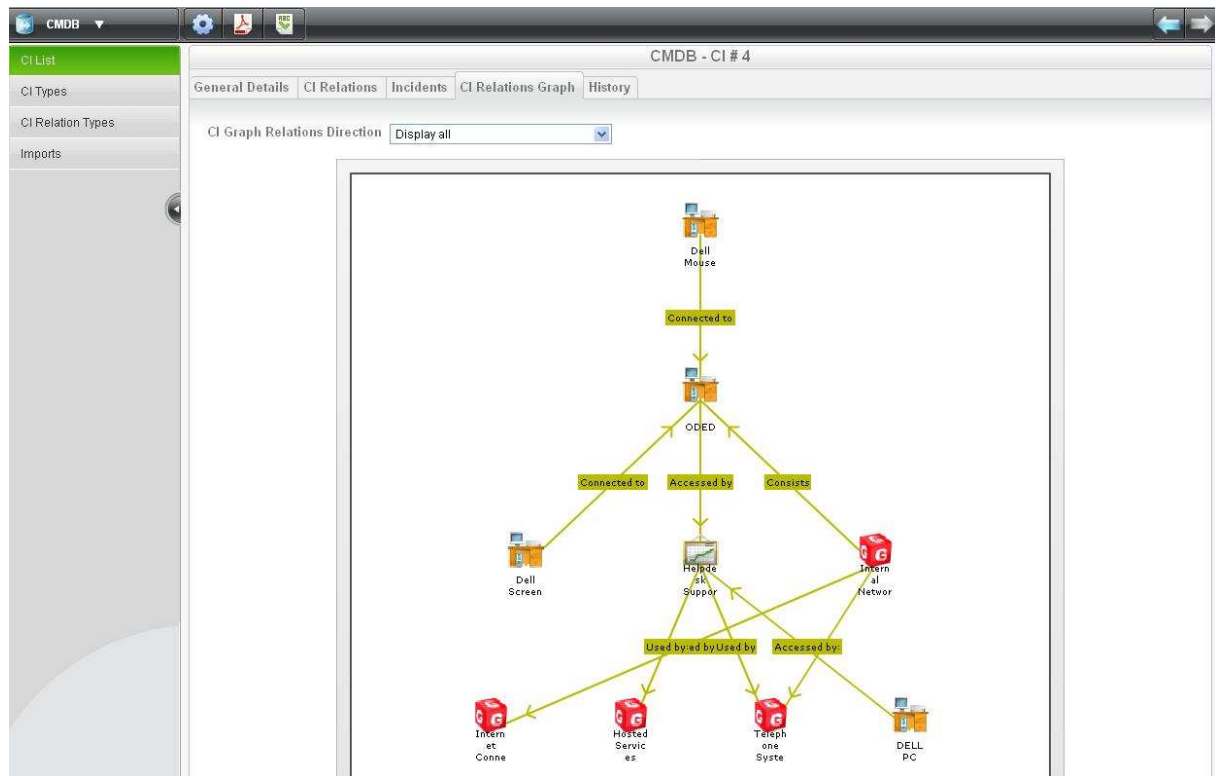
The SysAid CMDB can be useful for storing information about many kinds of items.

As long as you maintain and keep your CMDB up-to-date, you will be able to enjoy the associations SysAid creates between your various configuration items.

Here are a few examples for configuration items you can set and manage in your CMDB:

- hardware (including network components where relevant)
- system software, including operating systems
- business systems - custom-built applications
- software packages
- database products
- physical databases
- environments
- configuration baselines
- Policies (Backup, Security etc.)
- configuration documentation, e.g. system and interface specifications, licenses, maintenance agreements, SLAs, decommissioning statement
- other resources e.g. Users, suppliers, contracts
- other documentation e.g. IT business processes, workflow, procedures

80 CI Relations Graph




SysAid CMDB can be used for additional purposes outside your IT environment for example, even a Taxi station can use SysAid CMDB to keep track of the different vehicles, drivers, destinations, garages, and other relevant components and information.

ITIL In Action

You might be applying an upgrade to the internet firewall in your organization for example. SysAid's ITIL Change Management Module offers a best-practice process framework for managing all your change-related activities, such as analyzing costs and resources, coordinating an external specialist, carrying out risk assessments and devising a roll back plan. You could even coordinate scheduled internet downtime, obtain business approval, document changes and update your Asset Management and CMDB modules - all from within SysAid.

Another likely scenario is upgrading user workstations from Vista to Windows 7. SysAid's ITIL Change Management module automates the step-by-step workflow and chain of approval, which usually includes checking compatibility of existing hardware and software with Windows 7, ensuring proper licensing, arranging alternative workstations, acceptance testing and user training. You could also set automatic change templates for future upgrades.

In both cases, SysAid's ITIL Change Management module enhances efficiency and coordination of required change processes using ITIL best practice methodology, to ensure smooth transition with minimal impact to services and operations.

Please note: In the ITIL package the menus have been expanded to fit the package functionalities. You will notice  **Service Desk** menu link instead of **Helpdesk**. This link includes the sub-menu options: **Change Management** and **Problem Management**.

Please see the full ITIL Guide for full details
[http://www.ilient.com/download/ITIL Package.pdf](http://www.ilient.com/download/ITIL%20Package.pdf)

Chapter 14 SysAid Chat Module

SysAid allows administrators in the helpdesk to provide instant online support to end users via SysAid chat feature. The chat is fully integrated with your other SysAid modules, and you can improve your service level and add yet another channel of communication between administrators and end users by activating the SysAid chat.

The SysAid chat has many benefits, both for you as a helpdesk support team member, and for your end users:

- Immediate online communication available for your end users
- Initiate a chat with your end user with one click from within a Service request to assist him.
- Higher availability of the helpdesk for your end users- no need for phone calls, and full integration with the helpdesk- any chat can be connected to a service request.
- Ability to integrate the chat interface in your own website, simply by copying and pasting the provided code!
- And many more !

Please see the SysAid Chat Guide for full details on this module :
<http://www.ilient.com/download/chat.PDF>

Appendix 1

SysAid Menu Guide for Administrators

You can print off the following menu guide to help you find your way around SysAid.

Admin Portal- Home
Manager Dashboard
Asset Management
Helpdesk
Monitoring
Tasks/Projects
CMDB
Analyzer
Preferences
Community
Additional Modules

Admin Portal- Home
Administrators Online
Help Desk
Last Messages
Asset Management
Recent Forum Topics
Recent Forum Notifications

Manager Portal
Dashboard
Reports
Scheduler
Design dashboard
Design Reports
Reports tree

Asset Management
My Network Assets
Asset List
Search Assets
Add Assets
Import Assets
Software products
Catalog
Supplier List
Network Discovery

Helpdesk
All
Incidents
Change Requests

- Problems
- Service Request Actions
- Matrix
- Phone Call
- New SR
- Mobile
- Search
- Activities
- Knowledgebase

Monitoring

- Workstations
- Servers
- Workstation Templates
- Server Templates
- Notifications
- Monitor Settings

Tasks/Projects

- Projects
- Tasks
- Activities
- Notifications

Analyzer

- Analyzer File Tree

Preferences

- My Settings
- User Management
- Helpdesk Settings
- Remote Control Settings
- Account Defaults
- Customize
- Integration
- End User Portal
- Asset Settings
- CMDB Settings
- Project Settings
- Edit News
- Event Logs
- Sub Types
- Change Templates
- Problem Templates
- Helpdesk Notifications
- Downloads
- About

Appendix 2

Fields contained in the Help Desk → New SR → General Details Page of a Service Request

Field	Description
Category	The category a service request applies to. These are based upon the categories you set up in Help Desk Settings → Categories . For example: hardware, software, etc.
Sub-category	This field is positioned horizontal to the category field. It is an additional descriptive label and includes more detail of the type of service request. For example if category is hardware, the subcategory can be floppy.
Third level category	Optional further descriptive label. It should have been enabled in General Settings .
Title	Title of the service request, free text description. For example: Fax machine does not work.
Status	The status of the service request. A newly submitted service request will have a New status. The administrator can change the status once the service request has been opened, depending on the policy of your organization.
Urgency	This status is chosen by the end user when submitting the service request. It should not be confused with Priority .
Priority	This is determined by the SysAid administrator or by Priority rules.
Due Time	Set by Due Date Rule, the time by which the service request should be solved
Asset	The asset the service request was submitted from.
Submit user	The username of the person who submitted the service request
Request User	The user who requests assistance. This will often be the same user who submitted the request.
Assigned to	The administrator who should solve the request.
Admin Group	The admin group assigned to this particular service request.
Parent ID	Service requests can have parents and children, based on a requests relationship with one another. Say, for example, that one service request describes low memory. A second service request describes how a word processor does not load, while a third service request describes how a game will not start. The second and third service requests are linked to the first; the problems they describe stem from low memory. The administrator, therefore, can input the ID of the first service request as their parent. When the status of a parent service request changes, the status of the children also changes, automatically.
Child SR	
Include in Knowledgebase	A copy of the service request can be stored in the Knowledgebase.
Actions	Certain actions an administrator can perform: Send Message, Search Knowledgebase.

Appendix 3

Items contained in the Preferences→ Help Desk Settings→ General Settings page

Item	Description
<input type="checkbox"/> Email responsible when a service request changes	This option will send an email notification to the individual assigned to it if any changes are made to the service request. In each service request one can see in <i>General Details</i> , the individual assigned in the <i>Assigned To</i> field.
Email assigned group members when a service request changes	This option will send an email notification to the administrator group assigned to it if any changes are made to the service request. In each service request one can see in <i>General Details</i> , the administrator group assigned in the <i>Admin Group</i> field.
New service request default priority	For all new service requests you can set the priority level so that all incoming service requests will be displayed. If you want to retain the Urgency setting set by the end-user, you should select Priority=Urgency.
SMS notification on new service requests with priority >=	This option is useful for the most urgent service requests. You should set the priority level. Once you have set the priority level all service requests that meet the set priority generates a notification to your SMS. This will only work if you have set up: SMS gateway account, or if your company supports an email2sms service.
Send SMS to username	<p>In the field Send SMS to - add a username. The SMS number will be retrieved from the user account information located in My Settings. If you would like to send an SMS using an email account add "email:" before the SMS number (e.g. email:23423423@your_cellphone_provider.com) in My Settings.</p> <p>Note: You should insert your cellular phone number in My Settings page (Preferences → My Settings → SMS), plus go to Preferences→Integration→SMS.</p>
Email notification on new service requests with priority >=	This is the default setting for sending notification to one administrator upon receipt of all new service requests. Enter the username of the administrator. If you want a notification to be sent for all service requests change the priority to Low.
Send email to username	If you set up an administrator to receive notification in Routing , then that will take precedence over this option.
Browse	If you use Routing , for those categories not assigned under Routing , the setup here will take effect and send notification to the administrator. Add the username of the administrator here.

Item	Description
Send instant messages to administrators on new service requests	You can send an instant message to report a new service request. This will appear in a popup screen in SysAid.
Email notifications to end users when	Here you can set up to notify the end user via email when one or all of the criteria are fulfilled. The content of the email is set out in Customized Notification (Go to Preferences → Customize) .
<input type="checkbox"/> Status changes <input type="checkbox"/> Assign to changes <input type="checkbox"/> Notes are added	
<input type="checkbox"/> Enable third level categories	A service request has a category (such as “hardware” or “software”) and a subcategory (such as “keyboard” or “anti-virus”). Here, you can choose to enable third level (sub-sub) categories. To add third level categories in the Categories tab Go to (Preferences → Help Desk Settings).
<input type="checkbox"/> Reroute service requests, based on routing rules, when the details of the request change.	If a service request changes (Company, user group, category, administrator or administrator group), SysAid will reroute and follow the new routing rule. If the checkbox is disabled, service requests will be routed only once, when received.
<input type="checkbox"/> Enable incoming (pop3) email integration POP3 Server: Email address: User: Password: Create SR from new emails using the following parameters: Please select a category Please select a sub-category Please select urgency.	<p>If you enable email integration, input the necessary data into the appropriate fields. The email received will open as a service request. SysAid extracts email from an email box given with POP3 capability. SysAid uses a predefined set of parameters to open the service request. The parameters are: Category, subcategory, and urgency; meaning a service request opened by email integration will always have the same category, subcategory and the same urgency. SysAid can identify the end user by his/her email address. Email integration gives you more flexibility when connecting with the IT department. The POP3 email given should not be used for anything other than internal purposes. SysAid only supports POP3. The email address is the one you shall give to end users who want to send SR via this option.</p> <p>The service requests arriving by email will be assigned the following category and sub-category. The urgency that all service requests arriving by emails will be given is set here.</p>
Send replies to assigned admin(s) and change status to:	When a service request is replied, you will be sent a notification and the status of that request in SysAid will be changed. Select the status from the dropdown menu.
Ignore emails with subject matter to (regular expression):	For those emails that have in their subject matter: [insert regular expression] for example: (Undelivered Mail Returned) all such emails will be ignored.

Item	Description
Forward ignored emails to:	Insert the username of the individual who should receive the ignored emails.

Appendix 4

Fields available for customization of forms in SysAid various modules.

Service Request Form

Available fields for Customization	Additional Remarks
Activities	Present the Activities related to the service request
Attachments	Present the attachments to the service requests.
CC	Present the carbon copies for the service request.
CI Attachment	Present the CIs attached to the service request.
CI Relations	Present the relations to relevant CIs.
CI Relations Graph	Present the graph of relations between CIs related to the service request.
Close Time	Present the time in which the service request was closed.
Company	Present the company from which the service request was sent.
Department	Present the department from which the service request was sent.
Description	Present any text in the description field in the service requests.
Escalation	Present the escalations of the service request
Follow-up Actual Date	Present the actual date of the follow-up on the service request.
Follow-up Planned Date	Present the planned date for the follow-up on the service request.
Follow-up Text	Present the text for the follow-up on the service request.
Follow-up User	Present the name of the administrator who sends the follow-ups for the service request.
History	Present any text in the history field of the service request.
Links	Present all the links of the service request
Location	Present the location of the sender of the service request.
Messages	Present the messages sent regarding the service request.
Modify Time	Present the time in which the service request was last modified.
Notes	Present the notes of the service request
Project	Present the projects related to the service request
Request Time	Present the time in which the request was sent

Screen Capture	Present the screen capture attached to the service request.
Solution	Present the solution of the service request.
Source	Present the source of the service request
Resolution	Present the resolution of the service request.
Success Rating	
Task	Present the tasks related to the service request.
SR Custom Date 1, 2	Preset a special date field you have customized.
SR Custom Integer 1, 2	Present a special integer field you have customized.
SR Custom List 1, 2	Present a special list you have customized.
SR Custom Notes	Present notes you have customized.
SR Custom Text 1, 2	Present a special text field you have customized
Quick Name	
Category	
Title	
Status	
Urgency	
Priority	
Due Date	
Asset	
Submit User	
Request User	
Assigned to	
Admin Group	
Parent ID	
Child Service Request	
Knowledgebase	
Actions	
Screen Capture	
Re- opened	The number of times a service request has been reopened, that is, moved from a closed status to an open status.
Re-Assigned	The number of unique administrators that the service request has been assigned to throughout the service request life cycle.

Asset Form

Available Fields for Customization	Additional Remarks
Activity Log	Present the log of all the activities related to the asset
Attachments	Present the attachments to the asset
BIOS Type	
Building	Present the building in which the asset is located
CI Attachment	Present the CIs attached to the asset
CI Relations	Present the CI Relations of the asset
CI Relations Graph	Present the CI Relations graph for the asset
CPU Count	Present the CPU count for the asset
CPU Model	Present the CPU model for the asset
CPU Speed	Present the CPU speed for the asset
CPU Vendor	Present the CPU vendor of the asset
Child Assets	Present child- assets
Company Serial	Present the serial number of the company of the asset
Cubic	Present the cubic in which the asset is located
Department	Present the department that uses the asset
Display Adapter	
Display Memory	Display the memory of the asset
Display Resolution	
External Serial	Present the external serial number of the asset
Floor	Present the floor in which the asset is located
Hardware	Present the hardware of the asset
Helpdesk	
History	Present the history of the asset
Last Maintenance	Present the last maintenance date for the asset
Links	Present the links related to the asset
Location	Present the location of the asset
Monitor	Present the monitor of this asset
Monitor Serial	Present the serial number of the monitor of this asset
Mouse	Present the mouse of this asset
OS Serial	Present the serial number of the OS of the asset
Operating System Type	Present the type of OS of the asset
Operating System Version	Present the version of OS of the asset
Parent Asset	Present the parent asset
Printers	present the printers related to the asset

Purchase cost	present the purchase cost of the asset
Purchase date	Present the purchase date of the asset
RC	Present the remote control sessions on the asset
Registry Values	Present the registry value of the asset
Service Pack	Present the service pack of the asset
Software	Present the software installed on the asset
Source	Present the source of the asset
Supplier	Present the supplier of the asset
Support Provider	Present the support provider for the asset
Warranty Expiration	Present the warranty expiration for the asset
Vpro	
SNMP Custom Text 1-20	
Asset Custom date 1, 2	Present a special date you have customized
Asset Custom Integer 1, 2	Present a special integer field you have customized
Asset Custom List 1, 2	Present a special list field you have customized
Asset Custom Notes	Present customized notes
Asset Custom Text 1, 2	Present a special text field you have customized.
Last Access Time	
SNMP Parameters	
SysAid Agent Version	
Update Time	
Name	
Type	
Group	
Company	
Catalog Number	
Description	
Owner	
Users	
Serial	
Model	
Manufacturer	
Operating System	
CPU	
Memory	
Display	
Storage	
Network	

IP Address	Note that you can see the MAC addresses of the asset, view export and search by MAC address.
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Edit End user Properties

Available Fields for Customization	Additional Remarks
Active service request	Present the active service requests
Attachments	Present the attachments of the end user
CI Attachment	Present the CIs attached to the end user
CI Relations	Present the CIs related to the end user
CI Relations Graph	Present a graph of related CIs
Car License	Present the car license number of the end user
Cubicle	Present the cubicle of the end user
Date Input Style	
Department	Present the department to which the end user belongs
Disabled	Show whether the end user is enabled or disabled
Encoding	
Expiration Date	Present the expiration date of the end user license
Floor	Present the floor on which the end user is located.
Font Size	
Helpdesk	
History	Present the history of the end user
Is Supervisor	Show whether the end user is a supervisor or not
Language	Present the language of the end user
Links	Present relevant links for the end user
Location	Present where the end user is located
Notes	Present the notes of the end user
Service Requests	Present the service requests of the end user
Time Zone	Present the time zone of the end user

User Custom Date 1, 2	Present a special field you have created for dates
User Custom Integer 1, 2	Present a special integer field you have created
User Custom List 1, 2	Present a special list field you have created
User Custom Notes	Present your customized notes field
User Custom Text 1, 2	Present a special text field you have created
Building	
User Name	
Password	
Confirm Password	
First Name	
Last Name	
Email	
Text Message	
Phone	
Cellular Phone	
Company	

Supplier

Available Fields for Customization	Additional Remarks
Name	
Phone	
Fax	
Address	
Email	
Account	
Account Number	Present the account number of the supplier
Attachments	Present attachments of the supplier
Contact Name	Present the name of the contact person
Version	
ID	
Mobile	Present the mobile phone number of the supplier
Phone 2	Present another telephone number of the supplier
Supplier List 1, 2	Present a special list field you have created
Supplier Custom Date 1,2	Present a special date field you have created
Custom Integer 1, 2	Present a special integer field you have created
Custom Notes	Present a special notes field you have created

Custom Text 1, 2

Present a special text field you have created

Catalog item

Available Fields for Customization	Additional Remarks
Attachments	Present attachments to the catalog item
CI Attachment	Present CIs attached to the catalog item
Catalog Custom Date 1, 2	Present a special date field you have created
History	Present the history of the item
Links	Present the links of the catalog item
Supplier	
Account	
Model	
Manufacturer	
Name	
Catalog Number	
Notes	

Project

Available Fields for Customization	Additional Remarks
Account	
Assigned Group	Present the group of administrators to whom the project is assigned
Tasks	
Company	Present the company for which the project is performed
Description	Present the description of the project
Gantt	Present the Gantt chart of the project
History	Present the history of the project
Links	Present the links for the project
Notes	Present the notes of the project
Notification Title	Present the titles of the notifications sent regarding the project
Progress	Present the progress of the project
Project Custom Date 1,2	Present a special dates field you have created
Project Custom Integer 1,2	Present a special integer field you have created

Project Custom List 1,2	Present a special list field you have created
Project Custom Notes	Present a special notes field you have created
Project Custom Text 1, 2	Present a special text field you have created
Project Level	Present the level of the project
Raw Estimation	
Version	
ID #	
Category	
Title	
Manager	
Status	
Start Time	
End Time	
Requested Group	

Task

Available Fields for Customization	Additional Remarks
Activities	Present the activities of the task
Attachments	Present the attachments of the task
Description	Presents a description of the task
History	Presents the history of the task
Links	Presents the links added to the task
Notes	Presents the notes of the task
Task Notification	Presents the notification related to the task
Users	Presents the users who are involved in the task
Task Custom Date 1, 2	Present a special dates field you have created
Task Custom Integer 1, 2	Present a special integer field you have created
Task Custom List 1, 2	Present a special list field you have created
Task Custom Notes	Present a special notes field you have created
task Custom Text 1,2	Present a special text field you have created
Title	
Project	
Category	
Status	
Start Time	
End Time	

Estimation

Progress

CI

Available Fields for Customization	Additional Remarks
Attachments	Present attachments to the CI
CI Relations	Present CI relations
CI Relations Graph	Present the CI relations graph
Company	Present the company the CI is related to
History	Present the history of the CI
Incidents	Present the incidents of the CI
Links	Present the links of the CI
Users	Present the users connected to the CI
CI Custom Date 1-50	Present up to 50 special date fields you have created
CI Custom Integer 1-50	Present up to 50 special integer fields you have created
CI Custom List 1-50	Present up to 50 special list fields you have created
CI Custom Long Text 1-50	Present up to 50 special long text fields you have created
CI Custom Text 1-50	Present up to 50 special text fields you have created
CI Name	
Serial Number	
CI Type	
Status	
Priority	
Location	
Owner	
Supplier	
Supply Date	
Accept Date	
Import Items	

Notes

Service Request Action items

Available Fields for Customization	Additional Remarks
Account	
Admin Group	
Approved	
Budgeted	
CAB meeting reference	
CI Attachment	
Company	
Completed Time	
Complexity	
Department To Charge	
Duration in hours	
Enabled Time	
Expected Downtime End	
Expected Downtime Start	
Hardware Costs	
Impact	
Installation Costs	
Internal Manpower In Hours	
Location	
Maintenance Costs	
Modify Time	
Notes	
Completed Percentage	
Policy Compliance	
Priority	
Project	
Proposed delivery date	
Proposed version	
Re-opened	
Request time	
Resources required in days	
Software Costs	

Status

Submit user

Task

Title

Total Costs

Total Expected Downtime In

Hours

Training Costs

Urgency

User Acceptance

Service Request ID

Service Request Title

Assigned to

Instructions

Due Date

Further Guides and Reading

The following guides are also available from www.ilient.com.

Guide 1: Installing the SysAid Server

http://www.ilient.com/download/installation_guide.PDF

Guide 2 : Freeware Installation Guide

http://www.ilient.com/download/freeware_installation.PDF

Guide 3: Getting Started Guide

http://www.ilient.com/download/getting_started.PDF

Guide 4: Administrator Tools

http://www.ilient.com/download/administrator_tools.PDF

Guide 5: The Deployment Tool

<http://www.ilient.com/download/deployment.PDF>

Guide 6: The SysAid Agent

<http://www.ilient.com/download/agent.PDF>

Guide 7: End User's Manual

http://www.ilient.com/download/end_user_manual.PDF

Guide 8: Administrator's Guide

http://www.ilient.com/download/administrators_guide.PDF

Guide 9: The Database

<http://helpdesk.ilient.com/CustomPage.jsp?pageName=download.html&fileName=TheDatabase.pdf&EndUserLink>

Guide 10: Manager Dashboard Guide

http://ilient.com/download/manager_portal.pdf

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